R11i Navigating Oracle Applications

Course Introduction

Course Objectives

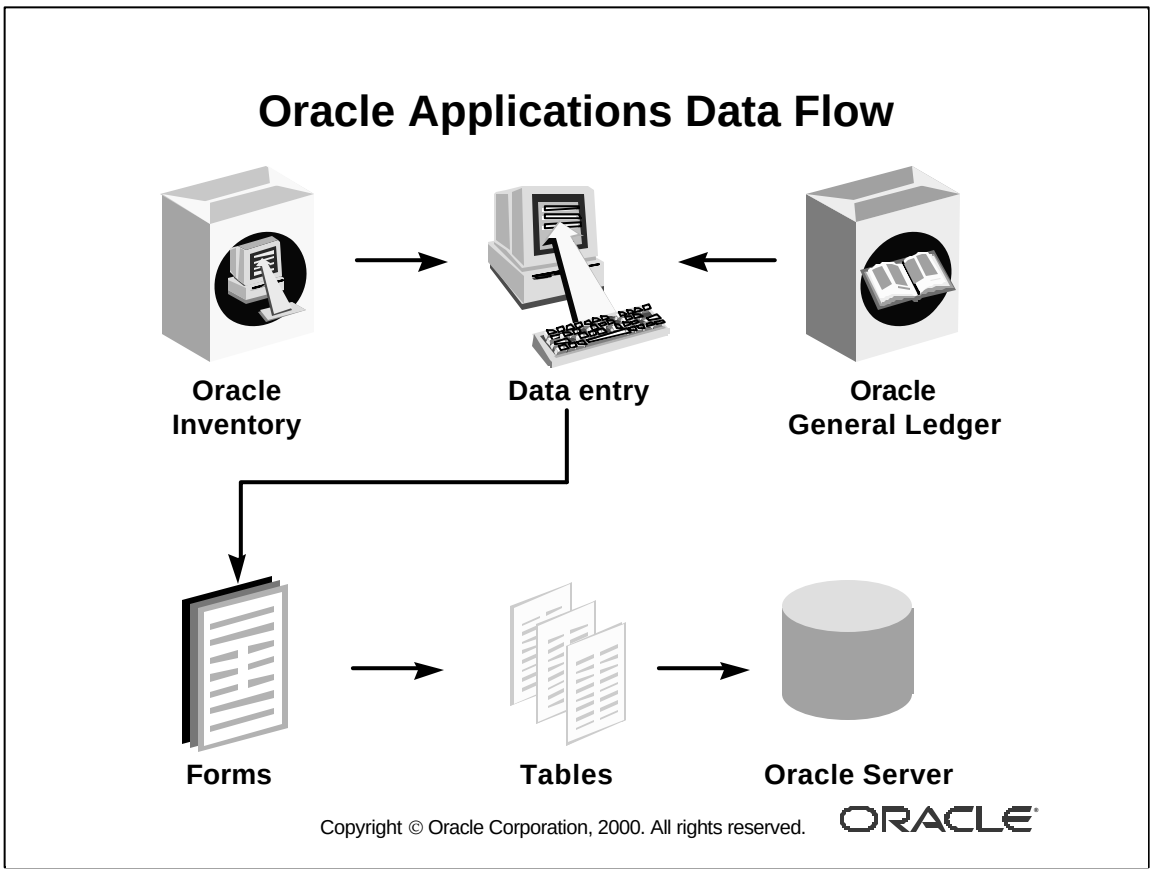
After this course, you should be able to:

- **Logon and off of Oracle Applications**
- **Use forms and menus**
- **Enter data using forms**
- **Search for data using forms**
- **Access online help**
- **Run and monitor reports and programs**
- **Customize the presentation of data using folders**
- **Set personal user profile options**
- **Manage an attachment to a form**
- **Identify and use the two types of flexfields**

Course Overview

This course discusses the basic features of accessing and navigating within Oracle Applications, Release 11*i*. You will learn to enter data, retrieve information in the form of a query, maintain data, use flexfields, and access online help. Additionally, concurrent processing and standard report submission will be discussed.

This course is intended for all end users of Oracle Applications as a prerequisite to any applications course.



Sample Flow of Oracle Applications Data

Oracle Applications is a tightly integrated suite of application products that share a common look and feel. Using the menus and windows of Oracle Applications, you have access to all the functions that you need to manage your business information.

Oracle Applications software is highly responsive to users by providing full point-and-click capability. You use your mouse or keyboard to operate graphical controls such as pull-down menus, buttons, pop-up lists, check boxes, or tabs. An Oracle Applications form is a user's interface to business data stored in the database. You may have called it a "screen" in other applications. You navigate between and within forms to enter and access information from the database.

Logging On and Off of Oracle Applications

Lesson Objectives

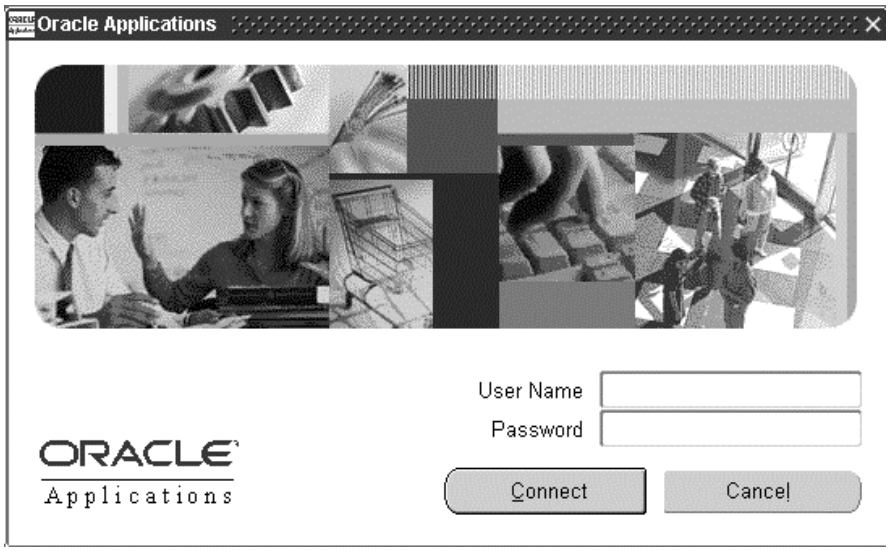
After this lesson, you should be able to:

- **Log on to Oracle Applications**
- **Choose a responsibility**
- **Use the Oracle Applications Navigator**
- **Discuss the various components of an Oracle Applications form**
- **Log off of Oracle Applications**

Lesson Overview

To use Oracle Applications productively, you need to understand the various components of a form, the menu paths, and keystrokes necessary to access and navigate within the system to perform your various job tasks.

Logging On to Oracle Applications



Starting Oracle Applications

The first step in starting Oracle Applications is to enter the appropriate URL for your site in an Oracle Applications certified browser.

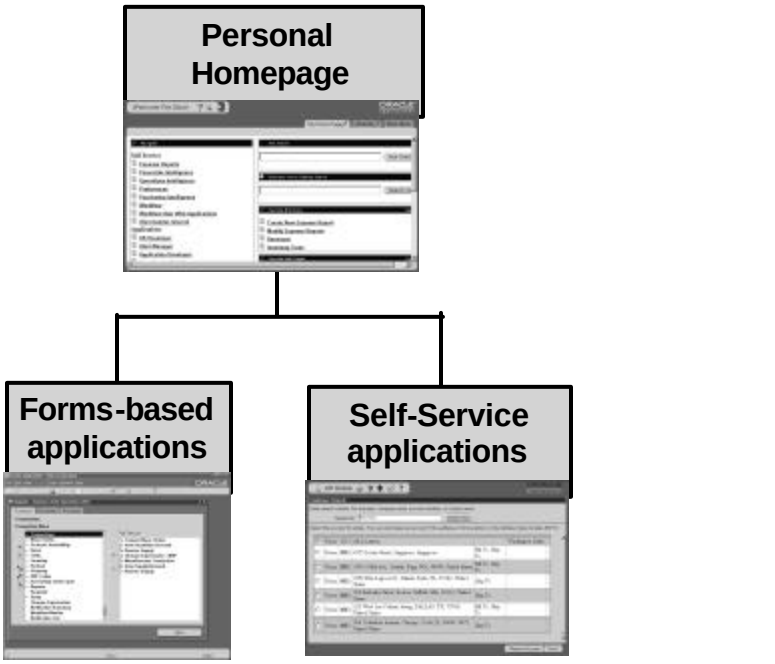
After starting Oracle Applications, the first window you see is the logon window.

You need an Oracle Applications user name and password, also known as an Oracle Applications user name, to log on to Oracle Applications. It is different from the user name and password you use to log on to your computer. If you are not sure of your Oracle Applications user name and password, consult your system administrator.

Oracle Applications security is based on your Oracle Applications user name. Your user name connects you to your responsibilities, which controls your access to applications, functions, reports, and data.

(Help) Oracle Applications User's Guide > Getting Started > Starting Oracle Applications > Starting and Logging On

Personal Homepage to Applications



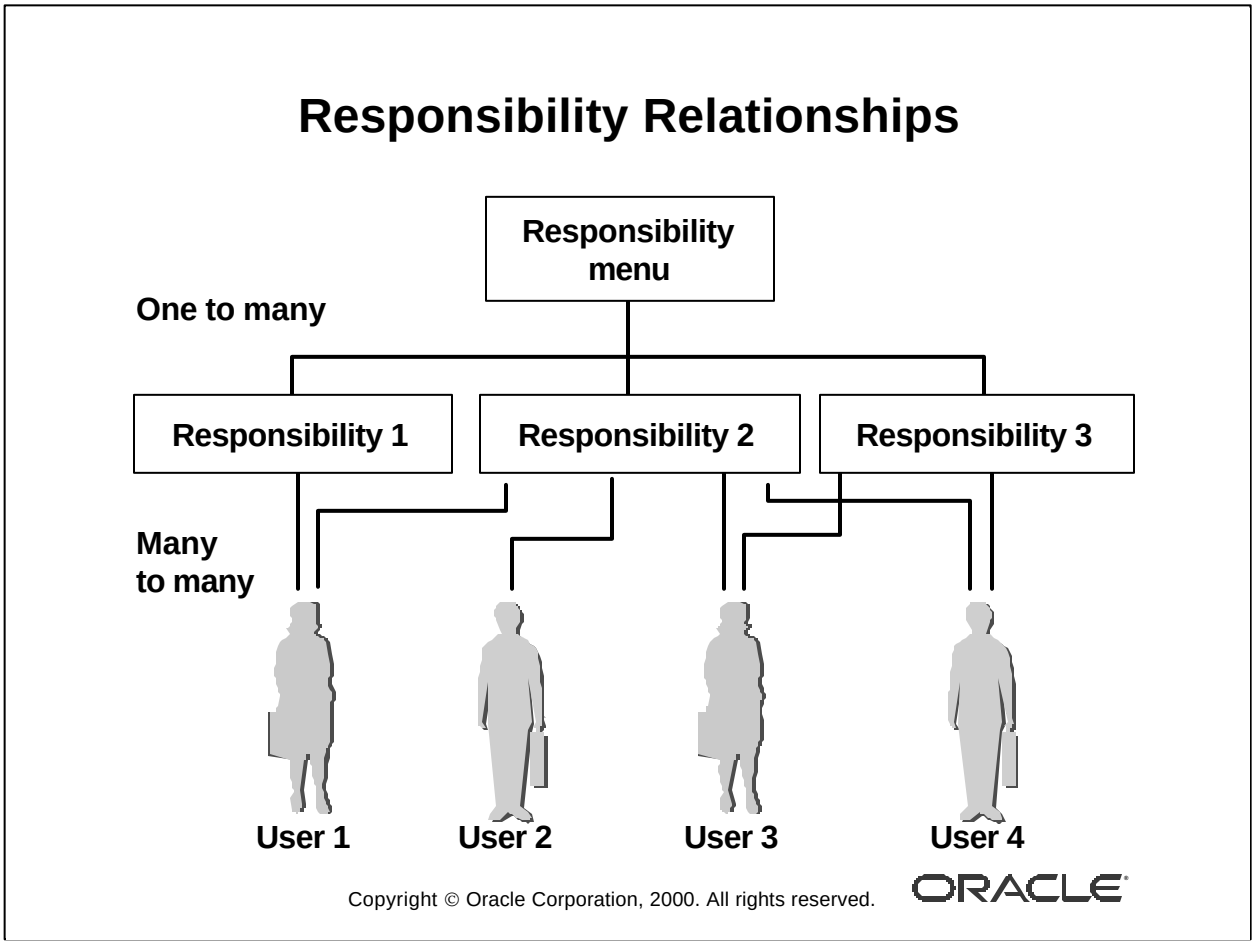
The Personal Homepage

After you log on to Oracle Applications, a Personal Homepage is displayed.

Responsibility Relationships: Many to One

Selecting a Responsibility

Once you have used the logon form to begin the logon process, you must tell the system what type of access you will be using. A *responsibility* is a set of data, menus, and forms that defines your particular level of authority while using the system. For example, you would want the Accounts Payable department of your company to access the invoice forms of the system, but you would not want them to be able to access any payroll information. Another example is that the controller of a department would want to have access to all the data that his or her employees can use, so the controller would want access to both accounts payable and payroll information.



Responsibility Properties

The following is a list of the types of responsibilities and the ir particular properties that can be defined in Oracle Applications by your system administrator:

A specific application (or applications), such as Oracle General Ledger.

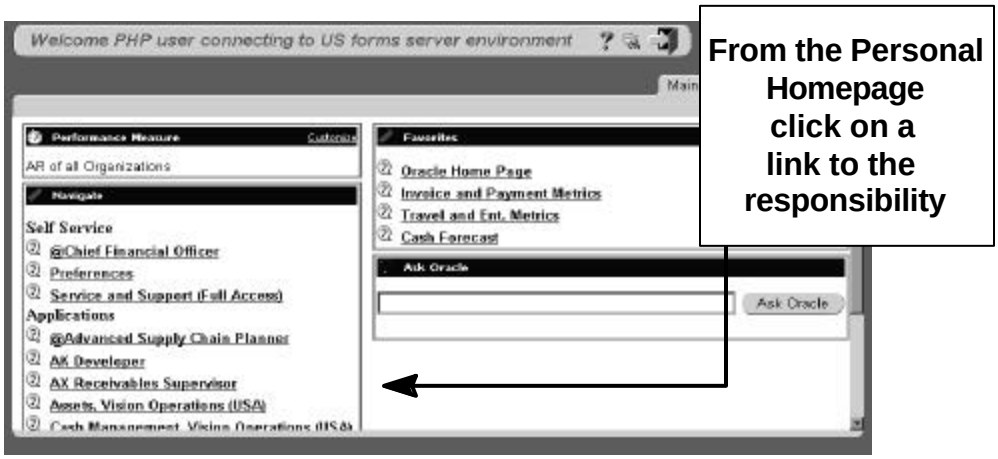
A set of books, such as Vision Operations or Vision Corporation or an organization, such as Vision Services or Vision Distribution.

A restricted list of windows to which you can navigate. For example, a responsibility may allow certain Oracle Financials users to enter invoices, but not to enter suppliers (vendors) or customers.

A restricted list of functions you can perform. For example, two responsibilities may have access to the same window, but the window of one responsibility may have additional functional buttons.

Reports in a specific application. Your system administrator can assign groups of reports to one or more responsibilities, so the responsibility you choose determines the reports that you can submit.

Choosing a Responsibility

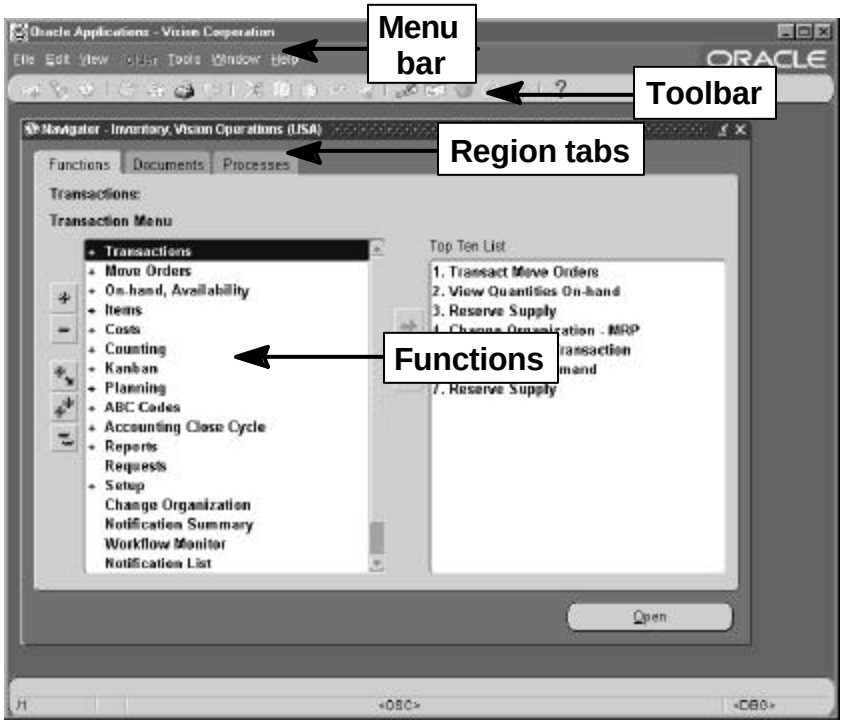


Responsibility Assignments

Each user has at least one responsibility and several users can share the same responsibility. Your system administrator can assign you any of the standard responsibilities provided with Oracle Applications, or create custom responsibilities for you. If you have only one responsibility with one function, and only one region on your Personal Homepage, you will go directly to that function.

Click on the underlined link in the Application section to select your responsibility.

Navigator



Navigator Window

The Navigator window displays the name of the responsibility you select in the title bar.

Use this window to navigate to a form so you can perform a specific business flow. You can navigate to the forms that are displayed in a navigation list on the left side of the Navigator window.

You can click on the tabs to access different regions.

Navigator Region Tabs

Region Tab	Description
Functions	Displays the forms that you can navigate to in a navigation list on the left-hand side of the Navigate window.
Documents	Displays links to documents that you have created.
Processes	Displays a visual map of a business process.

Using Region Tabs

The Functions tab displays all of the applications functions that you can access for the responsibility that you selected.

If you have a document, such as a particular purchase order, invoice, or sales order that you want to access later, you can create a link to the document using the Navigator's Document feature.

The Navigator's Document feature allows you to create as many links as you want and save them in the Documents region of the Navigator window. When you use a link to open a document, Oracle Applications opens the document in the appropriate form window. You can access the Document region using the tab control.

The Processes region of the Navigator (the "Process Navigator") automates business flows across Oracle Applications forms. It allows you to model and execute complex business processes through an easy-to-use, graphical user interface. The business processes enabled through the Process Navigator can cross product boundaries and include complete business cycles.

The Process Navigator guides you step-by-step through each required function in a business process. In addition to providing a visual map of a business process, the Process Navigator can launch the appropriate Oracle Applications forms or standard reports at each step.

Expanding or Collapsing the Navigation List

- **Choose one of the following methods to expand an item to its next sublevel form:**
  - **Double-click the item.**
  - **Select the item and choose Open.**
  - **Select the item and choose Expand.**
- **To collapse an expanded item, select the item and choose Collapse.**

Using the Navigation List

Each user can access the Oracle Applications forms in several ways so that they can use the system quickly, according to their own computer style. Use the various buttons on the Navigator to manipulate list items.

Expanding or Collapsing Several Items

- **To expand or collapse several items at once, choose one of the following buttons:**
  - **Expand All Children expands all the sublevels of the currently selected item.** 
  - **Expand All expands all the sublevels of all expandable items in the navigation list.** 
  - **Collapse All collapses all currently expanded items in the navigation list.** 

Using the Navigation List (continued)

Click any of these buttons to expand or collapse several items listed on the Navigator Menu. These functions are also available in the Tools pulldown menu.

Logging Off of Oracle Applications

- **(M) File > Exit Oracle Applications**
- **Use this method so that your username is cleared from system access.**

Exiting Oracle Applications

(M) File > Exit Oracle Applications, to log off the system. It is important to exit the system in this manner, rather than any other, as this is the only way to ensure that your user name is cleared from system access. You can also close the MDI window.

Summary

In this lesson, you should have learned how to:

- **Log on to Oracle Applications**
- **Select a responsibility**
- **Use functionality of the buttons and tabs that appear on the Navigator window and other forms**
- **Describe the uses of the various components of an Oracle Applications form**
- **Log off of Oracle Applications**

Practice Overview

In this practice you will:

- **Log on to Oracle Applications**
- **Choose the Training Administrator responsibility**
- **Use buttons on the navigator to view the functions**
- **Log off of Oracle Applications**

Practice Instructions

- **Log on to Oracle Applications using the user name and password supplied by the instructor.**
- **Choose the Training Administrator responsibility link on the Personal Homepage.**
- **Take about five minutes to familiarize yourself with the Navigator window and experiment with the functionality of the buttons discussed earlier in this lesson.**
- **Exit Oracle Applications properly when you are finished so you will not permit unauthorized access to another user.**

Practice Solution

• Follow the directions that the instructor gives you to access Oracle Applications or type “HRMS” in the User Name field and “WELCOME” in the Password field.

• When you are finished entering your user name and password, click Connect.

• Verify that the Personal Homepage appears similar to the one displayed in the next slide.

• Choose Training Administrator from the list using one of the following methods:

Use the [Tab] key to go down the list and select Training Administrator and press [Enter] on your keyboard.

Use your mouse to select Training Administrator.

• The Training Administrator Navigator window is displayed.

• (M) File > Exit Oracle Applications

Using Forms and Menus

Lesson Objectives

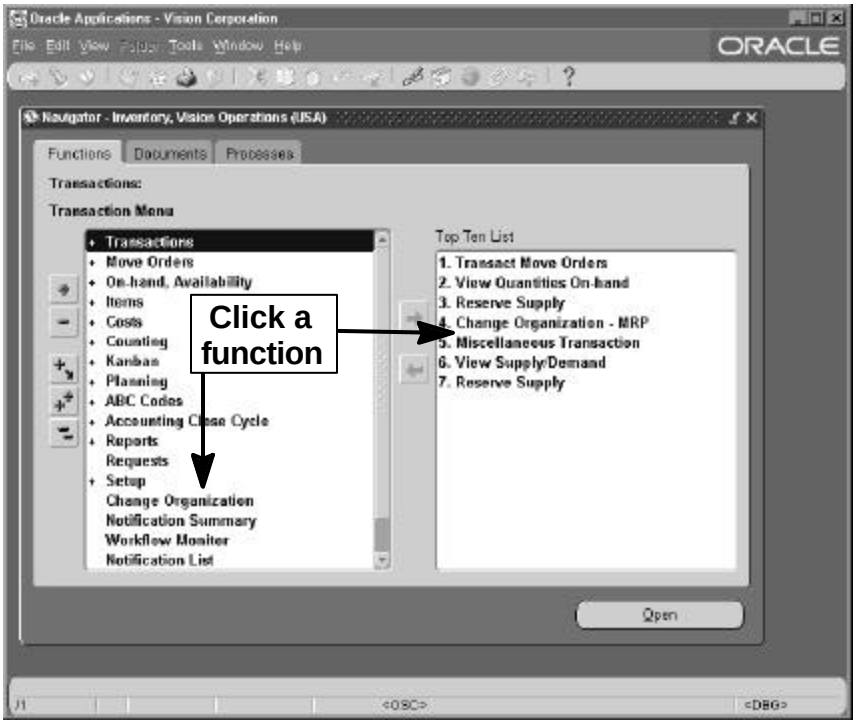
After this lesson, you should be able to:

- **Open a form from the Navigator window**
- **Define basic form terminology and characteristics**
- **Use the Applications toolbar**
- **Discuss keyboard shortcuts**
- **Use various menu options**
- **Change your password**
- **Change your security access by switching responsibilities**

Lesson Overview

This lesson discusses using forms and menus from the Navigator window. Form terminology, the Applications toolbar, and keyboard shortcuts will be explained to enable you to move quickly within Oracle Applications forms. You will also learn how to change your security access and password.

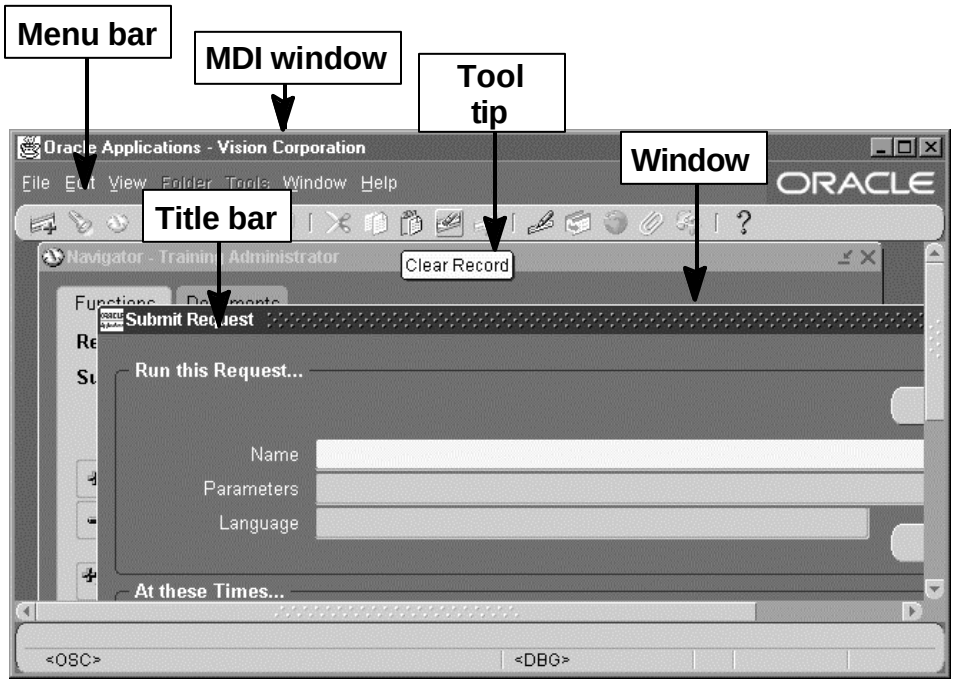
Navigator Window



The Navigator Window

Use the Navigator window to navigate to a form that lets you perform a specific business activity. The Navigator window is always present during your session of Oracle Applications and displays the name of your current responsibility in its window title.

Form Terminology



Form Terminology

Oracle Applications Release 11*i* works specifically in a Web-enabled environment. It is important to understand the terminology of the components within an Oracle Applications form. Common terms used in Oracle Applications forms are listed below.

Menu bar—Use pull-down menus from this menu bar to navigate or perform actions within a form

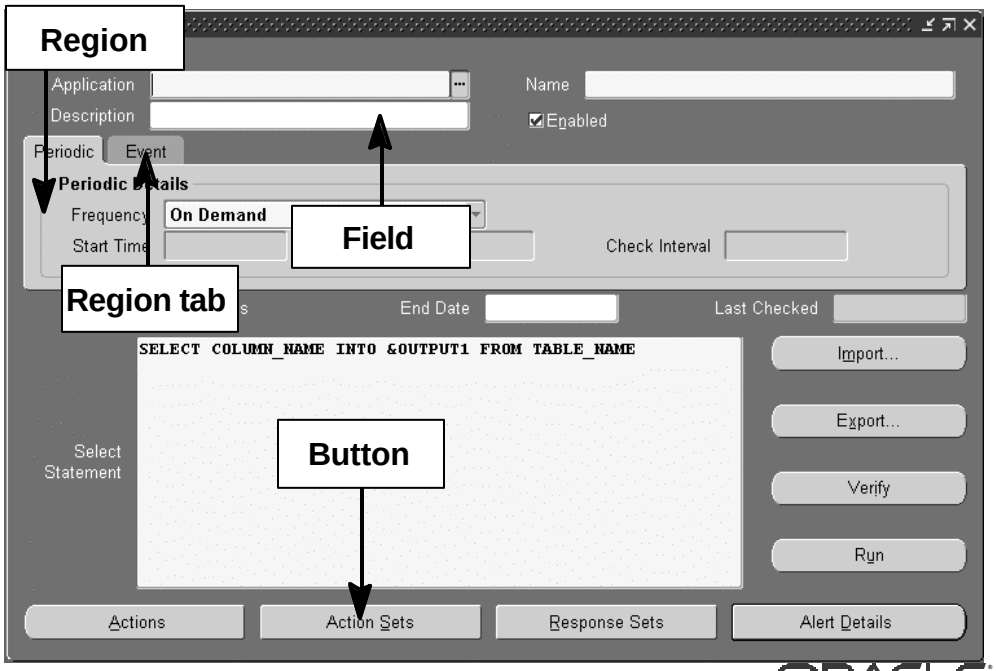
Window—An area where the user interacts with an application (Many windows can be open at one time and you can access these "overlapping" windows to perform data entry or data search activities.)

Window title—Text in the title bar that indicates the name of the window, and usually, context information pertinent to the information in that window

MDI window—A master container window that houses all windows, toolbars, and application windows

Tool tips—Iconic bubble help that you can use to determine the function of a button on the toolbar

Form Terminology



Form Terminology (continued)

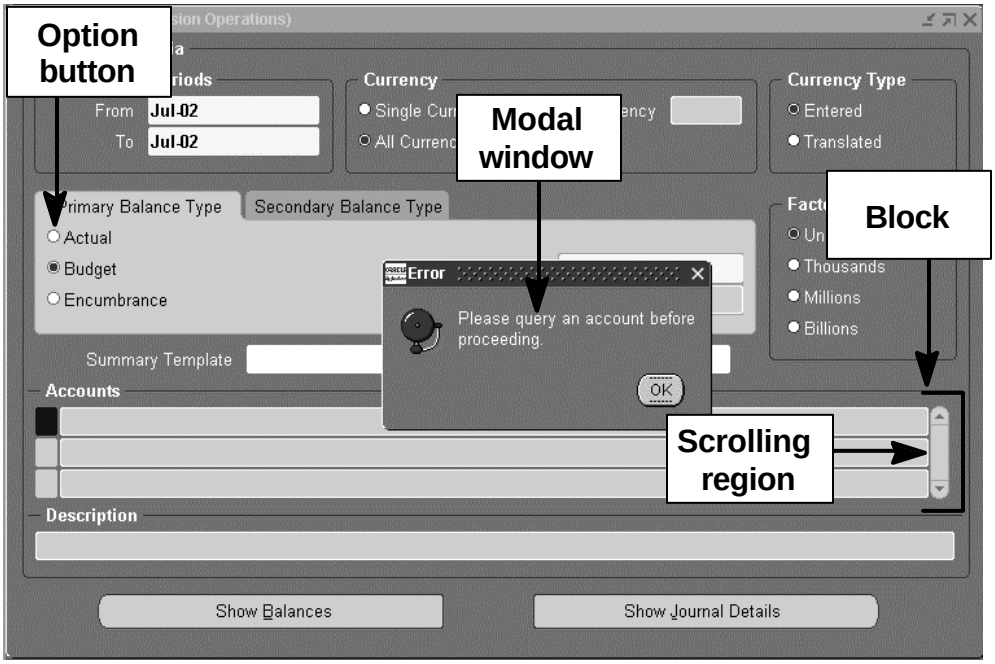
Region—A logical grouping of fields set apart from other fields by a box outline

Region tab—A collection of regions that occupy the same space in a window where only one region can be displayed at a time

Field—An area in a window that displays data or enables you to enter data

Button—A graphic element that initiates a predefined action when you click it

Form Terminology



Form Terminology (continued)

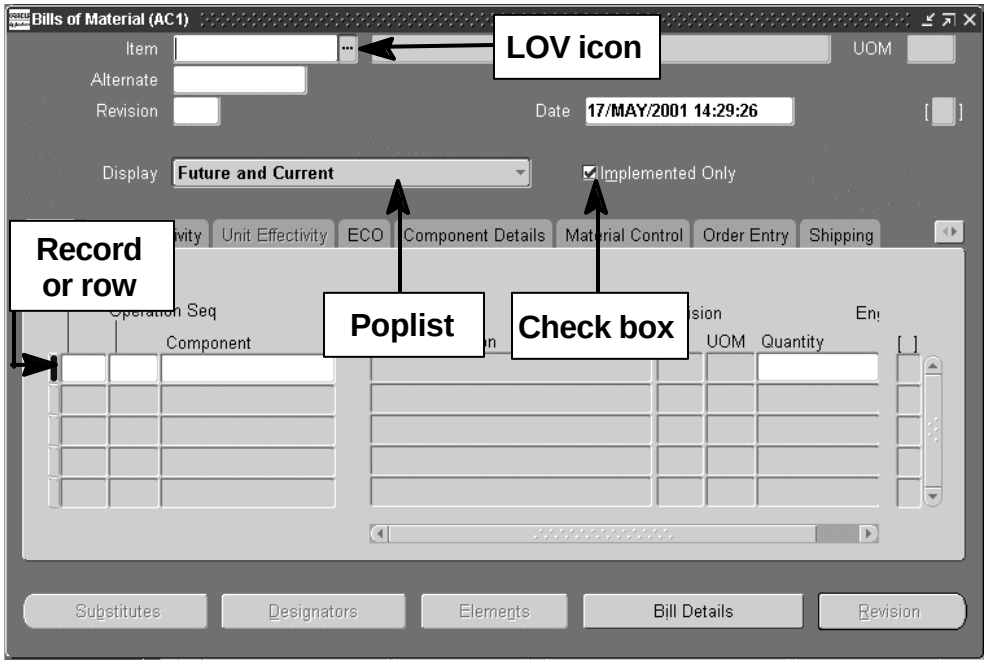
Option button—A button that indicates an individual selection is available within an option group

Modal window—A window that requires you to act on its content *before continuing*

Scrolling region—A region, containing a scroll bar, in which to view other fields

Block—An area of information relative to a specific business function or entity

Form Terminology



Form Terminology (continued)

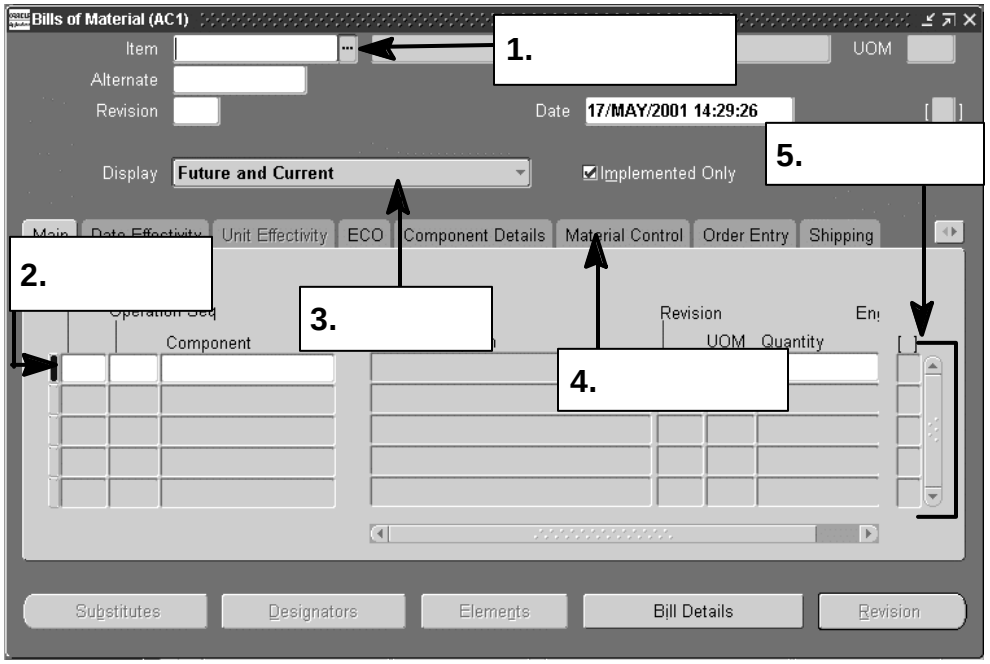
Record or Row—A set of one or more related data items from a table or view that are grouped for processing

Check box—A box in which you can toggle between an on/off or yes/no state for a particular value

LOV icon—An icon that you can click to display a list of values (LOV) for the current field

Poplist—A poplist lets you choose a single value from a short list

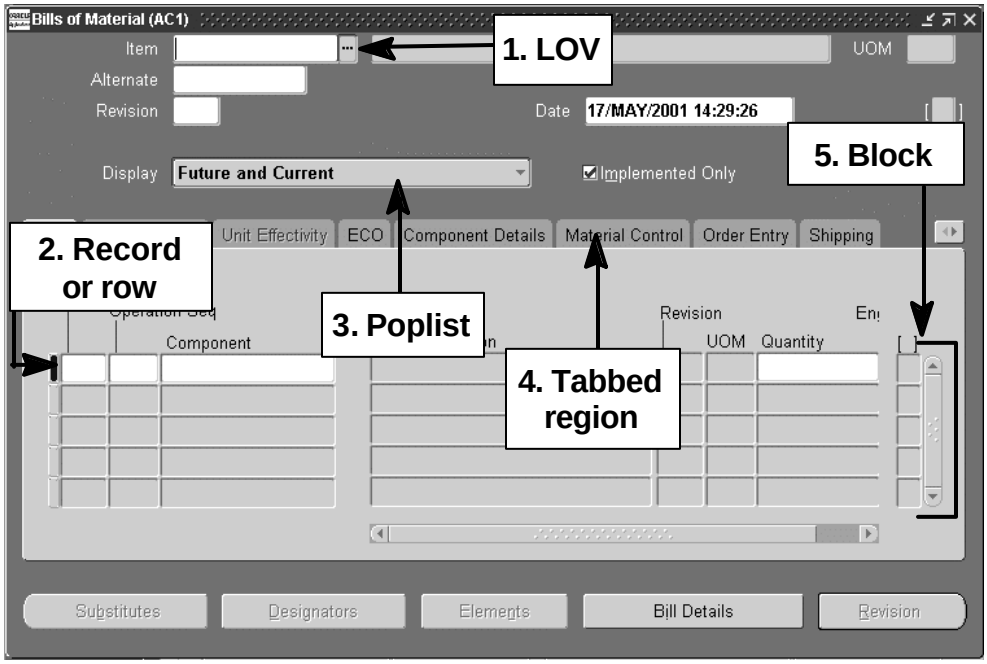
Terminology Review Questions



Practice Instructions

Label the numbered boxes in the slide.

Terminology Review Solution



Field Colors

Field Color	Description
White	Allow data entry
White with green text	Indicate drill-down capability
Yellow	Require data entry
Gray with black text	Are display only
Blue	Indicate fields to use in Query-Enter mode

What Field Colors Indicate

Each block contains fields you use to enter, view, update, or delete information. A field prompt describes each field by telling you what kind of information appears in the field or what kind of information you should enter in the field. Fields are color coded to indicate their type as follows:

White Fields—allow data entry

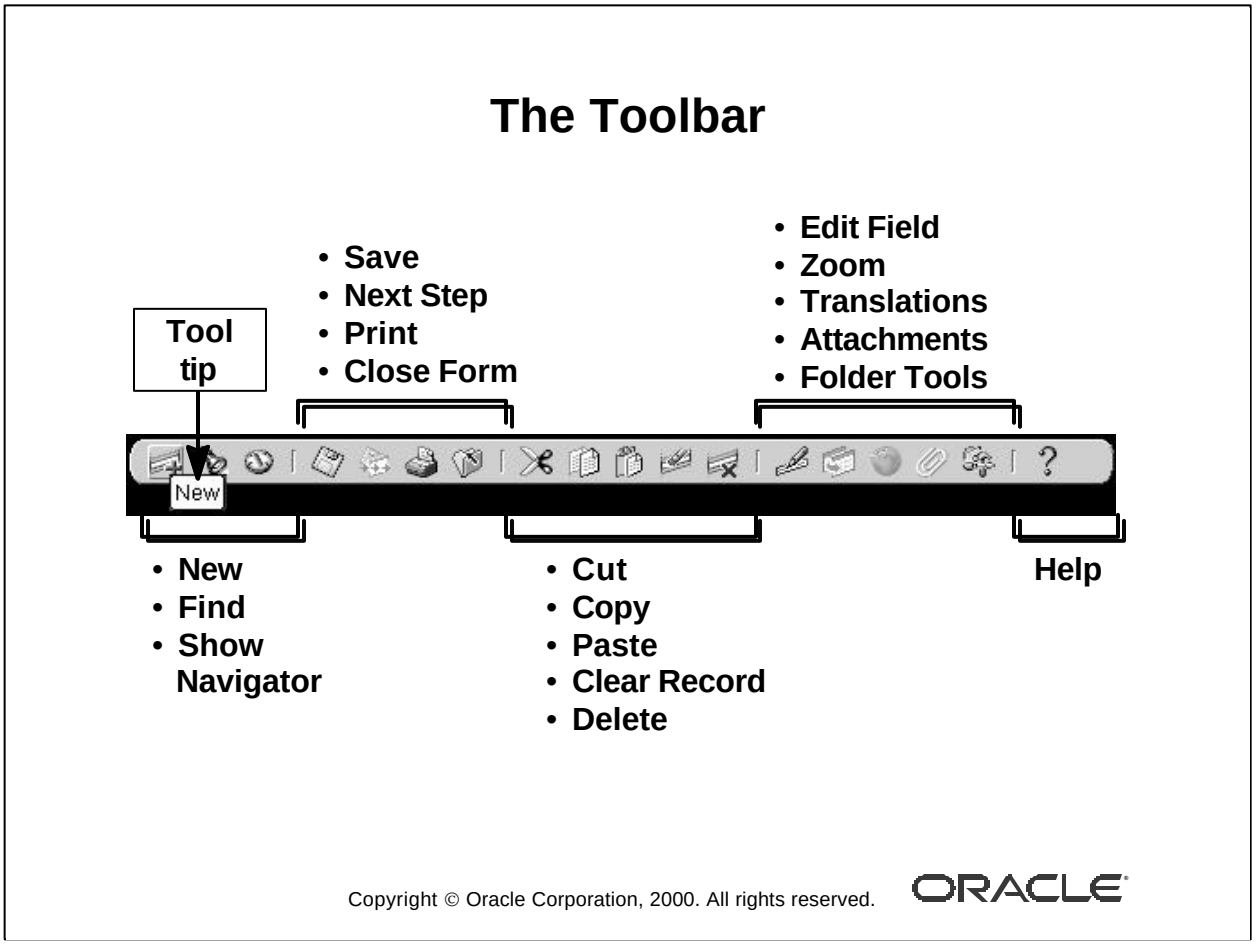
White Fields with Green Text—indicate drill-down capability

Yellow Fields—require data entry

Gray Fields with Black Text—are display-only

Blue Fields—indicate fields to use in Query-Enter mode

The term field generally refers to a text field, an area in a window that either displays data or allows you to enter data. However, a field can also include a button, check box, option group, or poplist.



Using the Toolbar

The toolbar is a collection of iconic buttons, where each button performs a specific action when you choose it. Each toolbar button replicates a commonly-used menu bar item. Depending on the context of the current field or window, a toolbar button can be enabled or disabled. You can display help or a tool tip for an enabled toolbar button by holding your mouse over the button.

The Toolbar Icons

- **New**
- **Find**
- **Show Navigator**

New

Creates a new record in the active form.

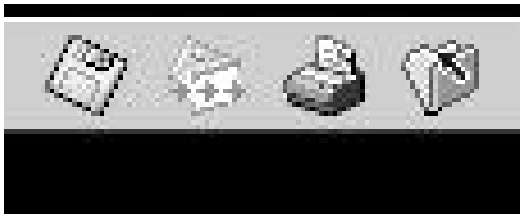
Find...

Displays the Find window to retrieve records.

Show Navigator

Displays the Navigator window.

The Toolbar Icons



- **Save**
- **Next Step**
- **Print**
- **Close Form**

Save

Saves any pending changes in the active form.

Next Step

Updates the Process workflow in the Navigator by advancing to the next step in the process. It also saves any pending changes in the active form.

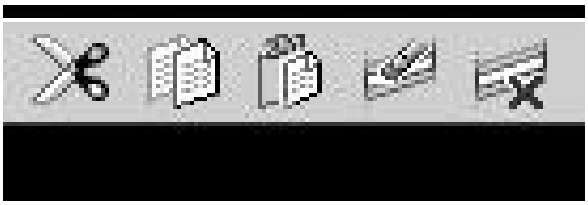
Print

Prints the current screen that the cursor is in. In some cases it may print a report associated with the current data.

Close Form

Closes all windows of the current form.

The Toolbar Icons



- **Cut**
- **Copy**
- **Paste**
- **Clear Record**
- **Delete**

Cut

Cut the current selection to the clipboard.

Copy

Copies current selection to the clipboard.

Paste

Pastes from the clipboard into the current field.

Clear Record

Erases the current record from the window.

Delete

Deletes the current record from the database.

The Toolbar Icons

- **Edit Field**
- **Zoom**
- **Translations**
- **Attachments**
- **Folder Tools**

Help

Edit Field...

Displays the Editor window for the current field.

Zoom

Invokes custom-defined Zoom (drilldown behavior).

Translations...

Invokes the Translations window (if multiple languages are installed).

Attachments...

Invokes the Attachments window. If one or more attachments already exist, the icon changes to a paper clip on a piece of paper.

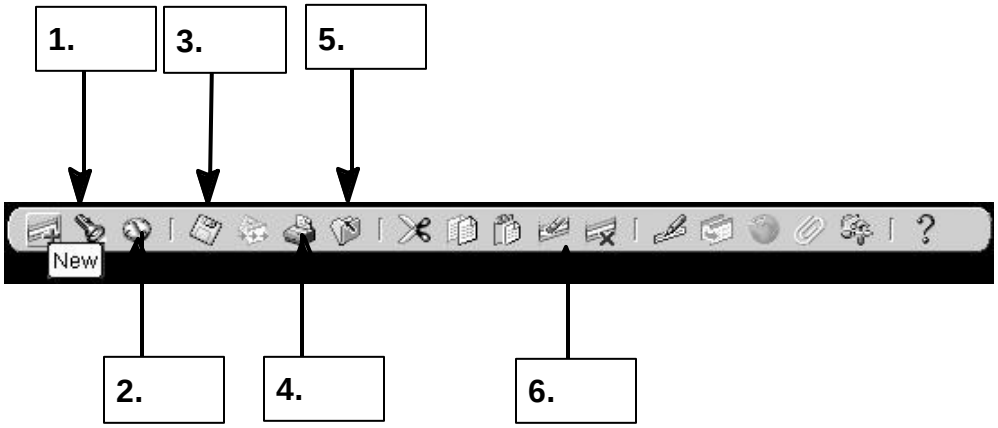
Folder Tools

Displays the folder tool palette.

Window Help

Displays help for the current window.

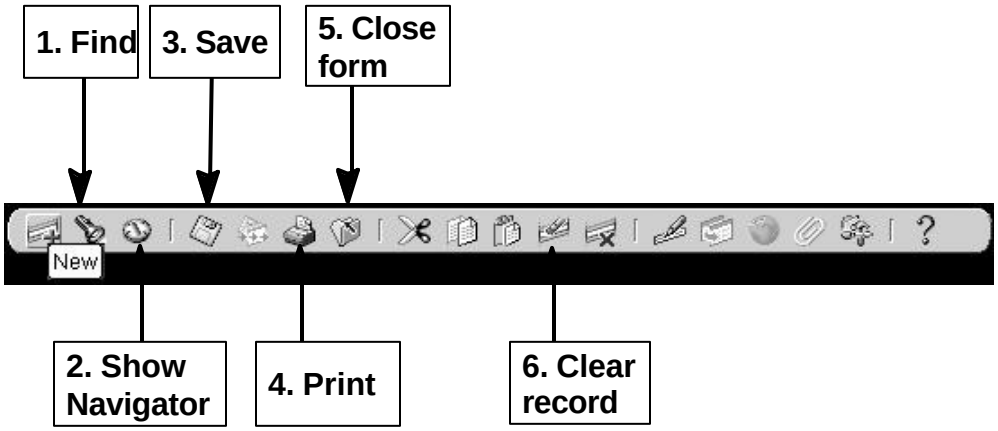
Toolbar Review



Practice 2 Instructions

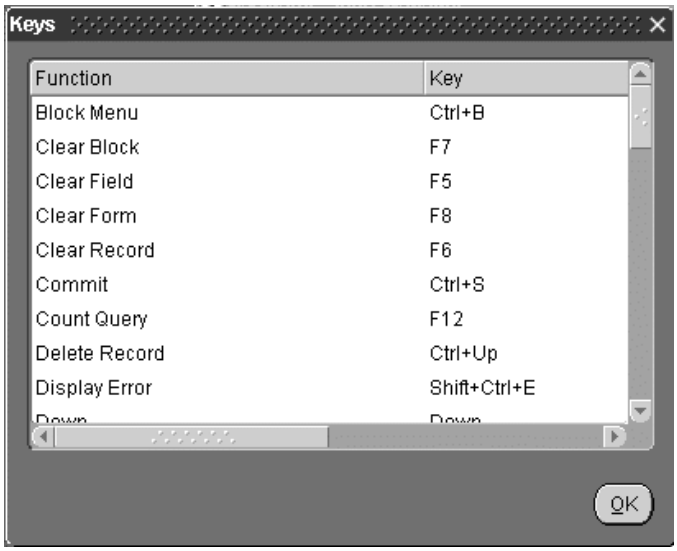
Label the toolbar icons.

Toolbar Review Solutions



Keyboard Shortcuts

(M) Help > Keyboard Shortcuts



Using Keyboard Shortcuts

Experienced Oracle Applications users can bypass the menu by using a keyboard shortcut, a specific combination of keystrokes that performs the same function as a corresponding menu item. Oracle Applications assigns many commonly used functions, such as Run Query, Save, or Clear Record to keyboard shortcuts.

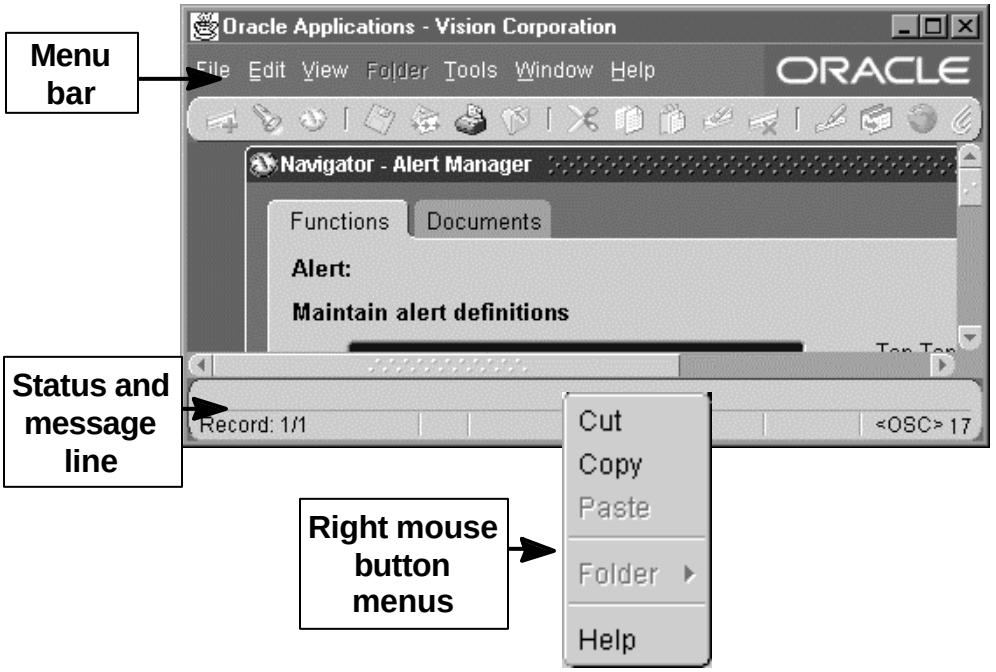
You can display a list of the keyboard shortcuts that map to your computer terminal's keyboard at any time.

To display a list of keyboard shortcuts:

(M) Help > Keyboard Help...

When you finish scrolling through the listing, click OK to close the window.

Menus and Special Areas



Using Menus and Other Areas

Oracle Applications use a Multiple Document Interface (MDI). All windows are displayed inside a single container window, with a single toolbar, menu, message line, and status line attached to that window. The message line displays pertinent information for processing your form. The status line displays status information.

The pulldown menu bar includes the following menus: File, Edit, View, Folder, Tools, Window, and Help.

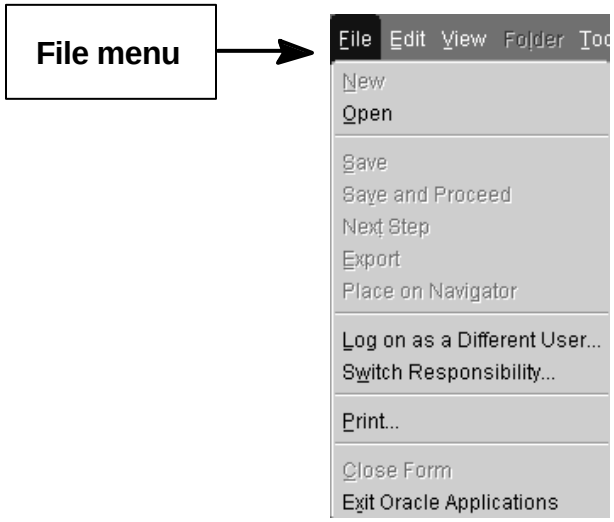
Use these menus to navigate through a form, to edit or retrieve data, or to perform various other actions.

In addition to the pulldown menu, you can access the following menu items by right mouse clicking on an item: Cut, Copy, Paste, Folder Menu, and Help.

File Menu

For a complete description of all menus go to:

(Help) Oracle Applications User's Guide > Getting Started > Using Menus



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Using the File Menu from the Menu Bar

New—Creates a new record in the active form.

Open—Opens the detail screen for the current selection.

Save—Saves any pending changes in the active form.

Save and Proceed—Saves any pending changes in the active form and advances to the next record.

Next Step—Updates the Process workflow in the Navigator by advancing to the next step in the process.

Export—Exports information in your current form to a browser.

Place on Navigator—Creates an icon in the Documents tab of the Navigator which can be used to recall the active form and its current record.

Log on as a Different User—Allows you to log on to Oracle Applications again as a different user.

Switch Responsibility—Allows you to change the responsibility in effect for your current log on.

Print…—Prints your current window. An application may override this action to instead allow printing of one or more specific reports.

Close Form—Closes all windows of the current form.

Exit Oracle Applications—Quits Oracle Applications.

Edit Menu

Using the Edit Menu from the Menu Bar

Undo Typing—Undoes any typing done in a field before the field is exited and returns the field to the most recent value.

Cut—Cut the current selection to the clipboard.

Copy—Copy the current selection to the clipboard.

Paste—Paste the contents of the clipboard into the current field.

Duplicate Record Above —Copies all values from the prior record to the current record.

Duplicate Field Above—Copies the value of the current field from the prior row.

Clear Record—Erases the current record from the window.

Clear Field—Clears the data from the current field.

Clear Block—Erases all records from the current block.

Clear Form—Erases any pending changes from the current form.

Delete—Deletes the current record from the database.

Select All—Selects all records (for blocks with multi-select).

Deselect All—Deselects all selected records except for the current record (for blocks with multi-select).

Edit Field…—Displays the Editor window for the current field.

Preferences Change Password—Displays the Change Password dialog box.

Preferences Profiles—Displays the Profiles window.

View Menu

Using the View Menu from the Menu Bar

Show Navigator—Displays the Navigator window.

Zoom—Invokes custom defined zooms.

Find…—Displays the Find window to retrieve records.

Find All—Retrieves all records.

Query by Example Enter—Invokes 'Enter Query' mode to enter search criteria for a query-by-example.

Query by Example Run—Executes the query-by-example.

Query by Example Cancel—Cancels the query-by-example by exiting from 'Enter Query' mode.

Query by Example Show Last Criteria—Recovers the search criteria used in the previous query-by-example.

Query by Example Count Matching Records—Counts the number of records that would be retrieved if you ran the current query-by-example.

Record First—Moves the cursor to the first record.

Record Last—Moves the cursor to the last record.

Translations…—Displays the Translations window.

Attachments…—Displays the Attachments window.

Summary/Detail—Switch between the summary and detail views of a combination block.

Requests—Displays the Request window.

Folder Menu

Using the Folder Menu from the Menu Bar

For some forms, you can personalize the presentation of data within a form by using a folder definition. With a folder definition you can modify the width, sequence, and prompts of the fields you want to display. Additional features of a folder definition are:

Displaying only those fields you are interested in viewing

Displaying a subset of records based on your specific criteria

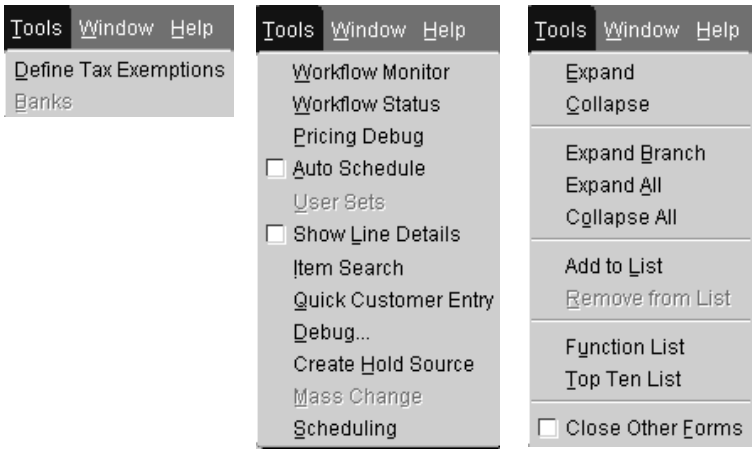
Automatically querying for a subset of records each time you open a specific folder

Keeping your folder customizations private or making them public for others to use

Making your customizations the default layout for a folder

Note: **Using Folders is covered in detail in the upcoming lesson "Customizing the Presentation of Data."**

Tools Menus



Using the Tools Menu from the Menu Bar

The Tools menus may contain up to fifteen product-specific entries. Examples of product-specific entries may include a list of commonly used Inquiry windows in the application, or a commonly used window that a user may want to display for a quick reference.

In some applications, up to two additional menus may appear after the Tools menu. These menus are usually labeled “Reports” and “Actions”, but may be different depending on the products that are being used. Like the Tools menu, these menus each allow up to 15 product-specific entries.

Window Menu

Using the Window Menu from the Menu Bar

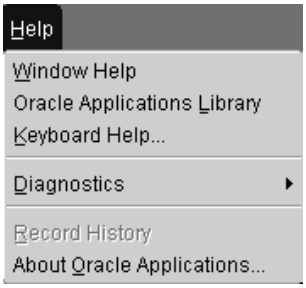
Cascade—Displays any open windows in a "cascaded" or stair-stepped fashion.

Tile Horizontally—Displays any open windows in a horizontally "tiled" (non-overlapping) fashion.

Tile Vertically—Displays any open windows in a vertically "tiled" (non-overlapping) fashion.

1 (Title of Open Window)—Displays a list of open windows titles in the order in which they are stacked.

Help Menu



Using the Help Menu from the Menu Bar

Window Help—Displays Help for the current window

Oracle Applications Library—Displays a window that lists all available Oracle Applications Help text

Keyboard Help…—Displays the current mapping of specific functions and menu options

Diagnostics—There are multiple Diagnostics menus used for coding and debugging.

Record History—Displays information about who created and updated the current record.

About Oracle Applications—Displays information about the current window and application

Commonly Used Commands

- File > Save
- File > Exit Oracle Applications
- File > Switch Responsibility
- File > Close Form
- Edit > Preferences > Change Password
- View > Find
- View > Query By Example
- Help > Window Help
- Edit > Clear Record

Review Question

Which of the following commands will not save a record?

1. Save toolbar icon

2. (M) File > Save

3. Next Step button

4. Icon with two plus signs

5. [Ctrl] + [S]

Practice 3 Instructions

Identify which command will not save a record in a form.

Review Solution

Which of the following commands will not save a record?

1. Save toolbar icon

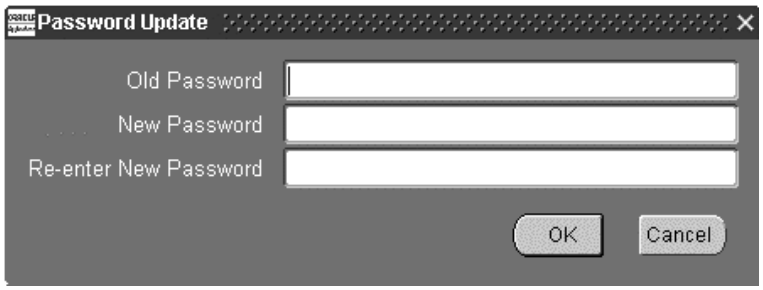
2. (M) File > Save

3. Next Step button

4. Icon with two plus signs

5. [Ctrl] + [S]

Changing Your Password



Password Update

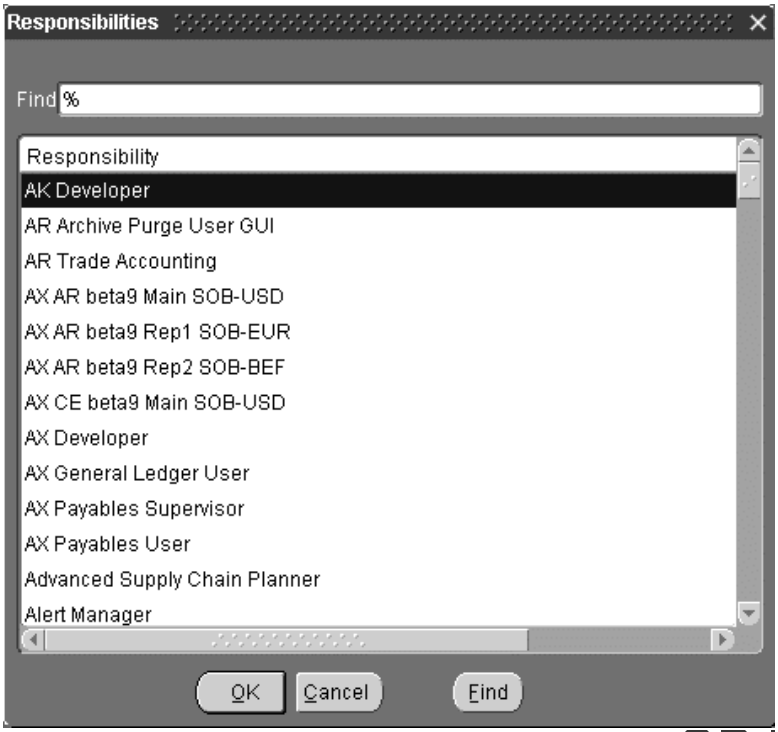
You can change your password at any time during your session. It will be in effect the next time that you log on.

How to Change Your Password

(M) File > Preferences > Change Password

Enter your old and new passwords and click OK.

Switch Responsibility



Responsibilities

You can switch your responsibility at any time during your session. You can then access functions pertinent to that responsibility

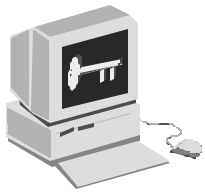
How to Switch Your Responsibility

(M) Edit > Switch Responsibility

Select a new responsibility from the list of values and click OK.

Demonstration

- **Changing your password**
- **Switching responsibilities**
- **Logging on again**

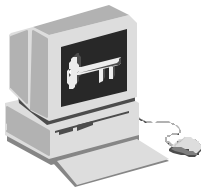


Summary

- Opening a form
- Form terminology and characteristics
- Using the Toolbar
- Using keyboard shortcuts
- Using Menus
- Changing your password
- Switching your responsibility

Practice Instructions

- **Log on using the user name, password, and responsibility that your instructor gives you.**
- **Change your password to STUDENT.**
- **Switch responsibilities to any other responsibility.**
- **Log on again using your new password.**



Practice Solution

- **Change your password**

  (M) File > Preferences > Change Password, enter STUDENT twice to confirm it.

- **Switch responsibilities**

  (M) File > Switch Responsibilities, select any responsibility from the list and click OK.

- **Log on again**

  (M) File > Log on as a Different User, enter the same user name you have been using and your new password.

Entering Data Using Forms

Lesson Objectives

After this lesson, you should be able to:

- **Create and delete records**
- **Use a list of values (LOV)**
- **Use a calendar to enter dates**
- **Use the editor**
- **Clear data from a form**
- **Duplicate data from another record**
- **Save edits to the database**

Entering Data Using Forms

This lesson illustrates the many functions that are available to you while performing data entry within Oracle Applications forms.

Creating New Records

New

(M) File > New

Creating a New Record

When you add a new record to the database, Oracle Applications will move the current record down and insert a new blank row. You add a new record by entering information into this blank row. In most screens you are automatically on a new record when the form is opened, so you can just start entering the information.

After you finish entering the data for your new record, you must remember to click Save so that your newly added information will be written to the database. If you enter five new blank rows of information but do not click Save when you are finished, none of this newly added information will be updated in the database (the system will prompt you to save before you exit).

How to Create a New Record

(M) File > New. Or, click the New icon on the toolbar.

You can also press the down arrow on your keyboard to insert a blank row, if you are not in a table on the form. Additionally, some applications have a button labeled New, and clicking it will insert a blank row.

Type the new information into the blank row.

(M) File > Save or click the Save icon to save the new record.

Deleting Records

Delete

(M) Edit > Delete

Deleting a Record from the Database

If you want to delete a record from the database, you must first display the record on your form and then click the Delete icon.

Note: **This option is not always available. For example, in Oracle Applications you cannot delete a customer once they have been entered; you can only inactivate their status.**

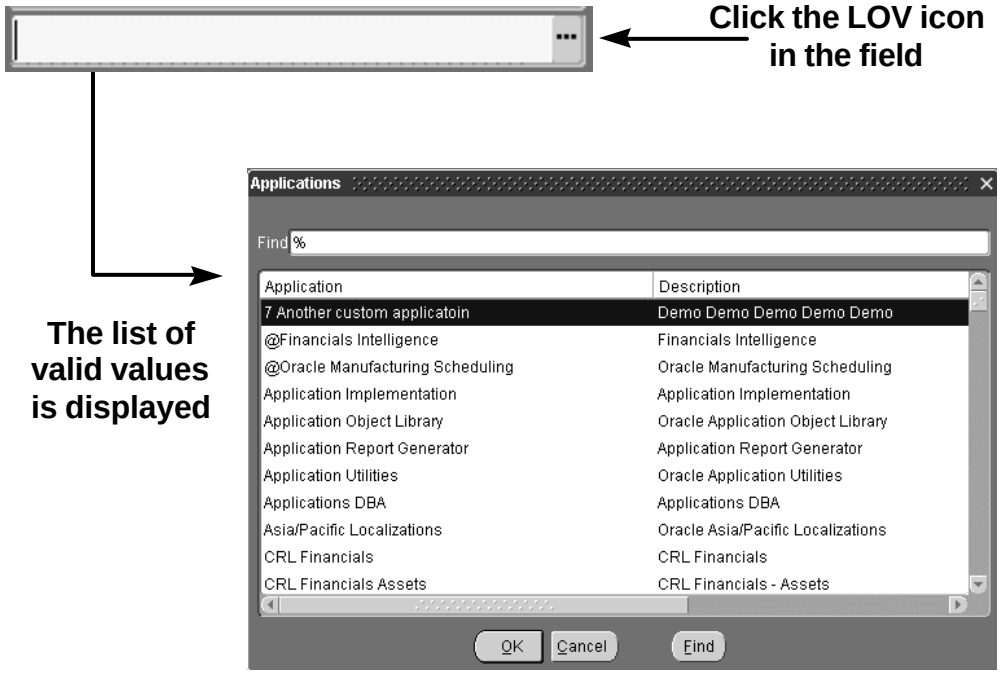
If you do not Save this new change to the database, the record is not truly deleted (the system will prompt you to save before you exit).

How to Delete a Record

(M) Edit > Delete, or click the Delete icon.

(M) File > Save or click the Save icon.

Using a List of Values



Using the LOV

The List of Values (LOV) feature is very useful while entering data in Oracle Applications. It provides you with a powerful, easy-to-use data entry method that increases your accuracy and productivity. Using the LOV makes data entry an easy task for novice users, and experienced users can enter correct data with a minimum number of keystrokes.

Oracle Applications notifies you when a list of acceptable input values is available for a field by displaying the List icon in the field. When you display a list, the values appear in a window with a title that describes the contents.

By using the LOV feature, you can save time and enter data quickly without having to memorize or look up valid data for each field. You can choose data from an online list of valid input choices whenever you want. Additionally, you are relying on Oracle Applications to validate your input since you will know right away if your entry does not match an option from the LOV.

LOV Shortcuts

- **AutoSelection**
- **List Search**
- **Long-List Fields**
- **Power List**

Choosing a Value from a List

To choose a value from a list for a field click the LOV icon in the field to display a list. If you do not want to view the entire list selection, you can reduce the length of a list, or select directly from the list by using some of the methods described below.

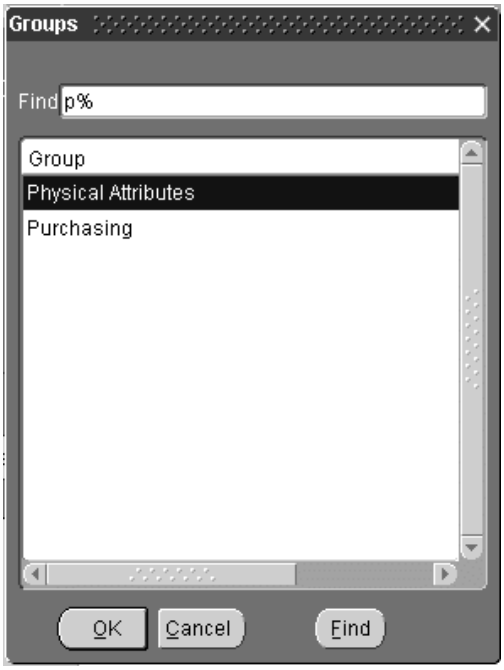
• Without clicking in the Find field (see screen shot above), type the first character(s) of a value to reduce the list to only those values that match the characters you enter. This is also known as AutoSelection.

• Search for a value by clicking in the Find field, then enter your search criteria in the Find field and click the Find button.

• Select a value directly from the list by using the mouse to scroll through the list and then double-click the value to choose it, or click once on the value and then click OK to choose it.

Once you choose a value, the list window closes and inserts the value into the current field. To close a list window without choosing a value, select Cancel.

AutoSelection and List Search



AutoSelection

Using the list of values feature called AutoSelection you can select a valid name from the list with a single keystroke. When you display the list window, you can type the first character of the name you want in the Find field. If only one choice begins with the character you enter, AutoSelection selects the choice, closes the list window, and enters the value in the appropriate field.

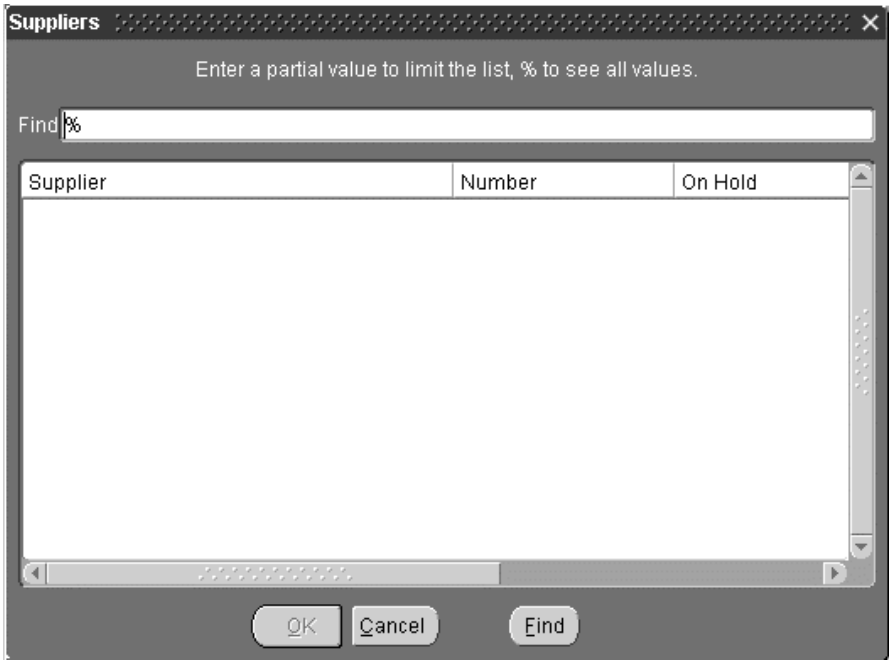
List Search

You can use the AutoReduction feature to reduce a list when you know the first few characters of your name selection. If you do not know the initial characters of your choice, but do know that your choice contains a certain word or set of characters, you can perform a list search to reduce a list.

In the list window, enter any group of characters as search criterion in the Find field and click the Find button. You can use wildcard characters such as the percent sign (%) which represents any number of characters, or an underline (_), which represents a single character in your search criterion.

For example, to reduce a list to only those choices that contain the phrase "schedule," you would type `%schedule%` in the Find field and click Find. In any of these list search queries, it does not matter whether you use uppercase or lowercase letters as the search is not case sensitive. Oracle searches all of the columns in the list.

Long-List Fields



Long-List Fields

If a field has a "long-list"—that is, a list of more than 100 values—when you try to display the LOV, Oracle Applications will display a window where you can enter list reduction criteria.

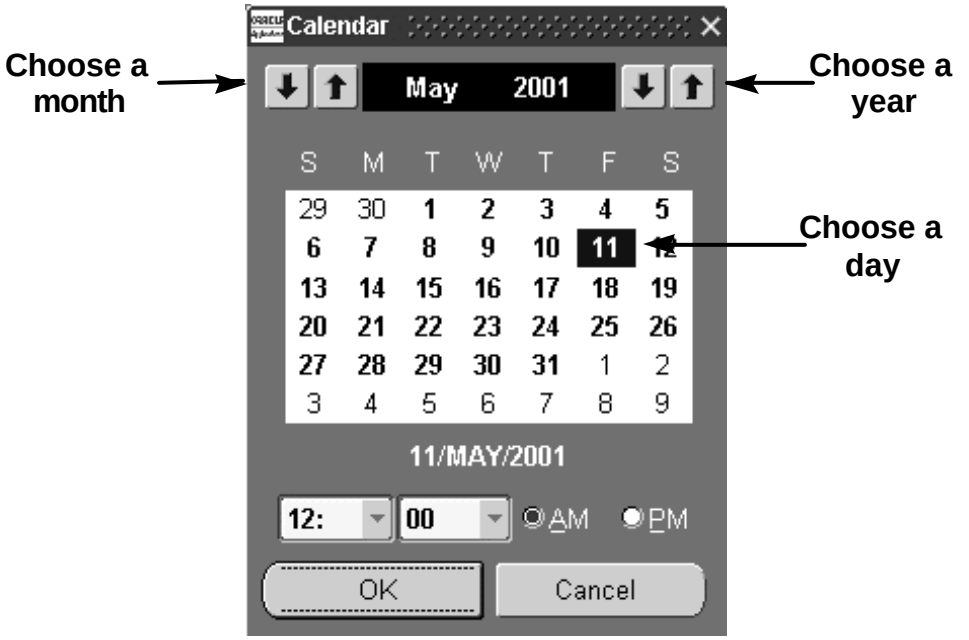
Because it takes less time to display a reduced list than a complete long-list, Oracle Applications prompts you to enter the first few characters that occur in your value of interest to reduce the complete list. However, to view the entire long-list, enter the percent sign (%) at the prompt and all of the values will be displayed.

Note: **To avoid excessive network traffic and reduced performance, try to enter specific criteria, other than just a percent sign (%), whenever possible.**

Power List

The Power List feature provides an even faster method of data entry. If a field displays a List icon and you know the value you want, simply enter the first few characters of the value in the field and press [Tab]. Power List will complete the entry for you. You can also include wildcard characters with your entry. You do not need to display the list window. If more than one value matches the characters you specify, a list window containing those values is displayed. If no values match the characters you enter, a list window containing all the values appears.

Using Calendars



Choosing a Date in the Calendar Window

Values in a date field can be typed directly or you can use a calendar to enter a valid value in a date field if the field displays the List icon. If your date field supports time, you can also use the Calendar window to choose a valid time with the date.

1. Put your cursor in a date field.

2. Click the List icon to display the Calendar window. The date value that appears below the calendar is called the *selected date*, which is either the value already in the field, the default value of the field, or the current system date.

3. Click on a date.

> **Note:** Disabled buttons that show dimmed text represent invalid days, which cannot be chosen. Similarly, if a date field is display only, you can display the Calendar window for the field, but you cannot change the date shown on the calendar.

4. Click OK to accept the selected date and close the window.

5. Click Cancel if you want to close the window without choosing a date.

Calendar Time

Choose an hour, minutes, and AM or PM

Choosing a Time in the Calendar Window

1. Follow steps 1 through 5 in the section *Choosing a Date in the Calendar Window* to choose a date. If the current field supports both date and time, the Calendar window reveals additional time items.

2. Click the hour or minute pop-up list icon to choose a time value. The minute pop-up list displays twelve values between 00 and 55 at 5-minute increments.

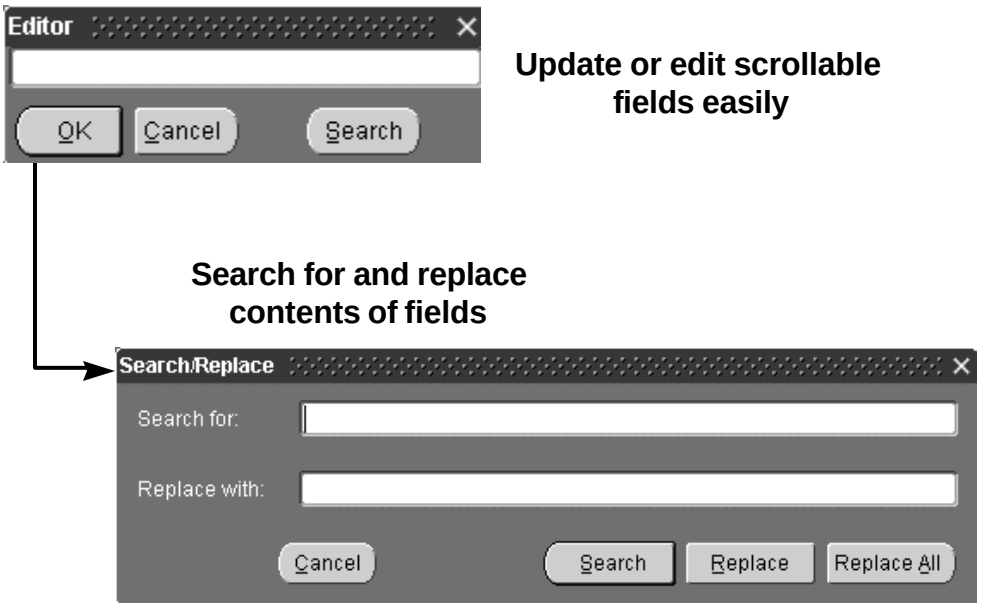
> **Note:** If a value already exists in the current date and time field when you display the Calendar window and the minute value is not a 5-minute increment, the minute pop-up list displays 13 values to include the minute value displayed in the field.

3. Check AM or PM.

4. Click OK to accept the selected date and time and close the window.

5. Click Cancel to close the window without choosing a date or time.

Using the Editor



Editing a Field

You can display an Editor window to view, enter or update the entire contents of a text field. The Editor window is especially useful for editing long text fields. A *scrollable text field* is a field in which the actual content is larger than what is displayed, but you can view the contents by scrolling through the field.

How to Use the Editor Window

(M) Edit > Edit Field.

You can enter a new value or edit the existing value in the Editor window. If the current field is a display-only field, then the Editor window appears in display-only mode.

You can also use the Editor window to search for a phrase and re place it with another phrase. Click the Search button in the Editor window to display a Search/ Replace window. Then, enter a value in the Search For field, and enter the other value in the Replace With field. Click Search to search for the value, or click Replace or Replace All to search for the value and replace the first occurrence or all occurrences with your new value, respectively.

Once you are satisfied with the value in the Editor window, click OK to close the window and insert the value into the field.

Clearing Data

Clear

(M) Edit > Clear > Record
(M) Edit > Clear > Field
(M) Edit > Clear > Block
(M) Edit > Clear > Form

Clearing Data from a Form

You can clear data from the screen at almost any time. Typically, you will use this feature when you start to enter data into a field and then change your mind. Oracle Applications will think you are in the middle of processing a record and may not proceed with your next task until you clear the field.

The data you clear is simply erased from the screen and not deleted from the database.

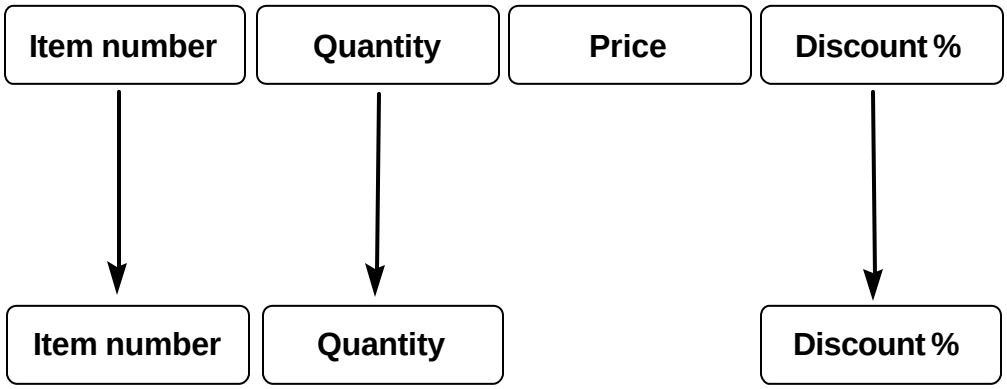
> **Note:** If the data is new and has never been saved to the database, it will be lost permanently when you clear it from the screen.

(M) Edit > Clear, and then choose the appropriate option, to clear a field, record, block, or form.

You can also clear some or all data from a field by highlighting the data and choosing
(M) Edit > Cut.

Copying Data from a Record

Check your data because not all fields always copy!



Duplicating Data from a Previous Record

To save time during data entry, you can duplicate data from a previous record if much of the data needs to be repeated again in the new record. You can use Cut, Copy, and Paste from the Edit menu or you can use the following techniques:

Copying a Field Value from the Previous Record

1. Enter a new record or query an existing record in your form.
2. (M) File > New or click the New icon to insert a new record after the existing record.
3. Place your cursor in the field whose value you want to duplicate.
4. (M) Edit > Duplicate Field Above, to copy the field value from the previous record into the current record.

Copying All Field Values from the Previous Record

1. Follow Steps 1, 2 above.
2. (M) Edit > Duplicate Record Above, to copy all field values from the previous record into the current record.

Note: Depending on the record storage in the database and relevant database tables, not all fields may be copied when using this feature. Be sure to check your new record carefully before you assume all fields have been copied into the new record. This feature may not be enabled in some forms.

Saving a Record

Save

(M) File > Save
(M) File > Save and Proceed

Saving Your Work

When you save your work, Oracle Applications updates the underlying database with the work you have done since you last saved your changes and then informs you that the transaction is complete. Saving your work is sometimes referred to as *committing a change* or *committing a transaction*.

Oracle Applications always validates your work upon saving it. If any of the data you enter is invalid or missing, Oracle Applications displays a message describing the problem and does not save the data.

To save your work, use any of the following methods:

(M) File > Save.

(M) File > Save and Proceed. This will save any changes you have made to the current window and move to the next record (new or existing) so you can enter another transaction.

Click the Save button in the Toolbar.

Use keyboard shortcut [Ctrl] + [S].

Summary

- Creating and deleting records
- Using a list of values (LOV)
- Using a calendar to enter dates
- Using the editor
- Clearing data from a form
- Duplicating data from another record
- Saving edits to the database

Guided Practice Overview

In this practice you will use various techniques to enter data using forms.

- **Using the System Administrator responsibility, you will add a user name for a new employee at your company.**
- **Use the LOV feature to enter default values for all required fields.**
- **Use the calendar to assign effective dates for the responsibilities that you assign.**

Note: The purpose of this practice is to familiarize you with actual data entry in a form, not to teach you field values in the System Administration forms, so the default values that you select for the required fields do not matter.

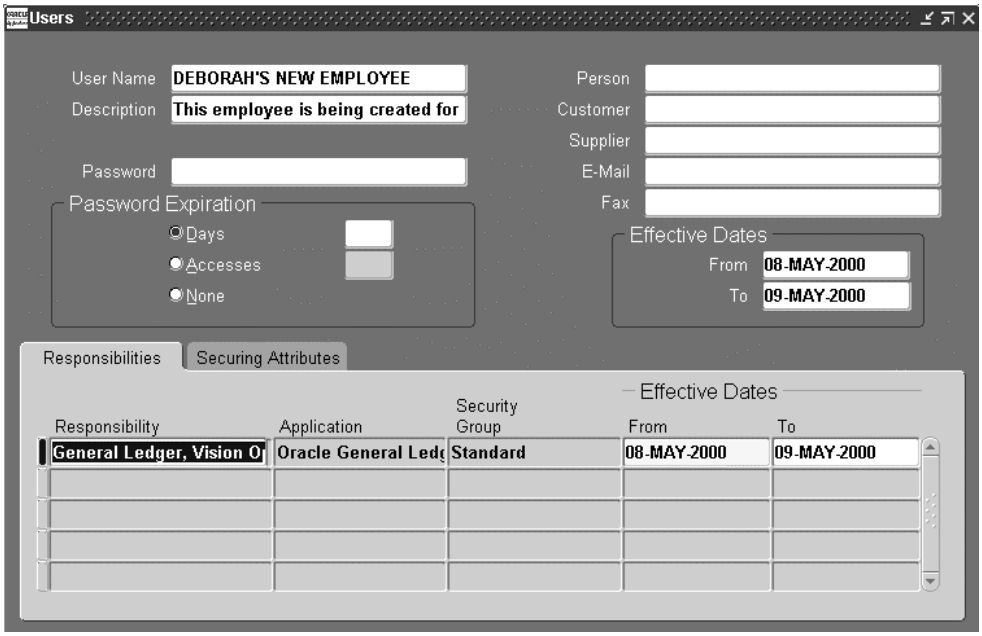
Guided Practice Instructions

- **Access Oracle Applications using the System Administrator responsibility.**
  (M) File > Switch Responsibilities, select System Administrator from the list and click OK.
- **At the Navigator window, select Security > User > Define.**
- **Enter the new user name. For this practice, your new username will be "*<your name> New Employee*". For example, "Deborah New Employee".**
- **In the Description field, use the editor to enter a long description of your user.**
- **In the Password field, enter "*welcome*".**

Guided Practice Instructions

- **Go to the Responsibilities tab and use the LOV and the calendar to enter default values for any required fields.**
- **Remember to save your work.**
- **How would you delete this item?**
- **Log on again using the new user name.**
- **Be sure that the responsibilities that you assigned appear in the Responsibilities list.**

Guided Practice Solution



You cannot delete a user name, but you can set the To Effective Date to deactivate the user by a certain date.

Searching for Data Using Forms

Lesson Objectives

After this lesson, you should be able to:

- **Use the Find window to perform a search**
- **Search data using Query By Example**
- **Include wildcards and query operators in your search criteria**
- **Identify the difference between Find and Query mode**
- **Review records retrieved from a search**

Lesson Overview

Oracle Applications provides you with easy-to-use search capabilities to access application information. This lesson demonstrates how to retrieve, view, and maintain data within Oracle Applications forms.

Searching for Information

Basic Business Needs

In Oracle Applications you can quickly retrieve and review all available information in your database without having to remember the information displayed in the windows, or without having to print lengthy reports to see the data. Instead, you can simply run a search to obtain the information you want, and then review the data online in the same window you used to enter the data.

By using the query function in Oracle Applications, you can satisfy the following information search needs.

Gain instant, online access to all of your application information. You can find information quickly and easily, without having to use a complex query language.

Search for a specific record or for a group of records based on criteria you enter. You can retrieve this information directly, without having to review all the information in your application database.

Search for information using criteria of different types or lengths, including a single letter, a single word, or a group of characters, or anything else you want to enter.

Find out how much information is available that matches your search criteria before a search for a single piece of information yields 10,000 responses.

How to Use Find Mode

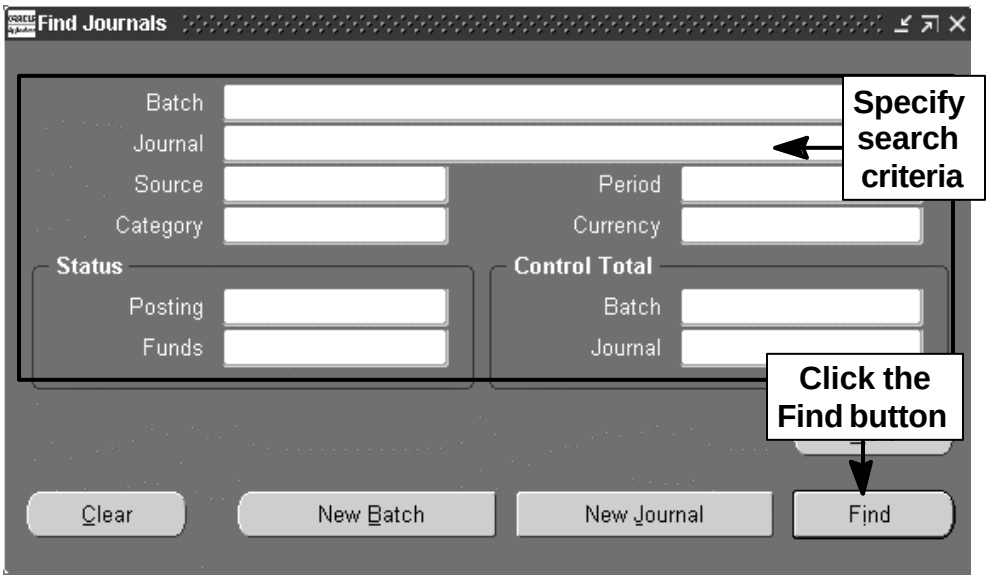
1. Click on the Find icon on the toolbar
2. Specify your search criteria
3. Click the Find button on the Form
4. Review the retrieved records

Using Find Mode

To search for records in your current block or window, use the Find window. The Find window contains fields for entering search criteria. These fields are specific to the current block and often validate the search criteria you enter against a list of valid values.

Generally, a Find window is displayed for those blocks that have many records or for those blocks that can be best searched using criteria in more than one field.

Using the Find Window



(M) View > Find

Using the Find Window

1. (M) View > Find or click the Find icon on the toolbar.

2. Enter your search criteria in the appropriate fields of the Find window.

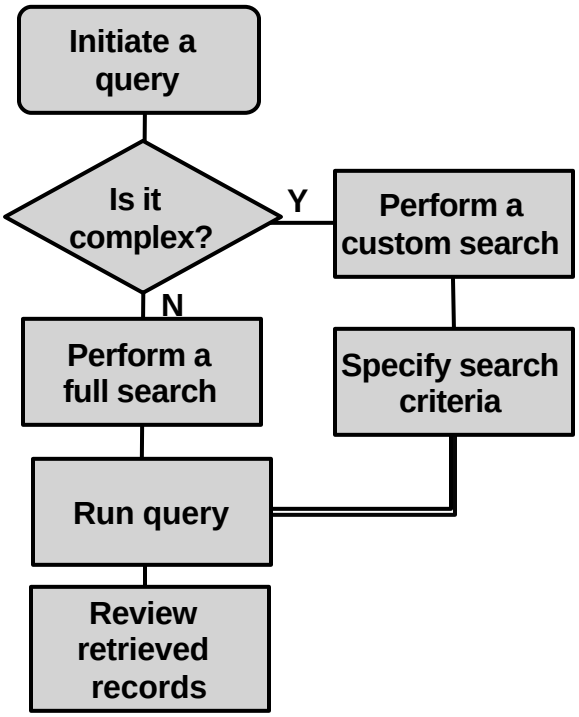
If a field does not provide a list of values for you to choose from, you can enter wildcard characters (% and -) in the search phrase. You cannot, however, use query operators (such as >, <, and so on) in a Find window.

3. Click the Find button to find any matching records.

4. Click the Clear button to clear the current search criteria from the Find window so you can enter new search criteria.

5. Click the New button to enter a new record in your current block if your search finds no matching records. Not all windows support this.

Specifying Complex Search Criteria



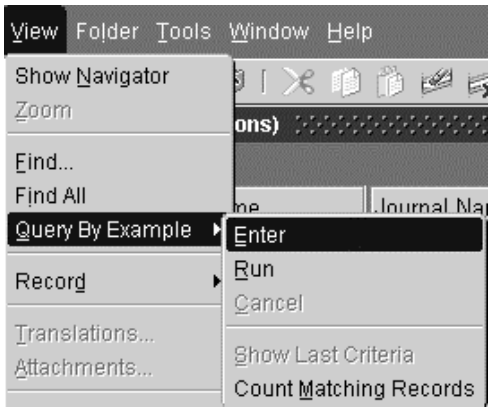
Using Query Mode

To retrieve a group of records based on more sophisticated search criteria than Find mode can achieve, you can use Query mode to specify complex search criteria in most of the fields of your current block. The search criteria can include specific values, phrases containing wildcard characters, and phrases containing query operators to help you pinpoint the data of interest.

In addition, if you do not actually need to retrieve the records in Query mode, but only want to know how many records match your search criteria, you can perform a query count to save yourself time.

Using Query Mode

1. **(M) View > Query By Example > Enter**
2. **Enter search criteria**
3. **(M) View > Query By Example > Run**
4. **(M) View > Query By Example > Cancel**



How to Use Query Mode

1. (M) View > Query By Example > Enter.

2. Enter search criteria in any of the queryable fields (indicated by blue), using wildcard characters and query operators as necessary. You can also select
View > Query By Example > Show Last Criteria to display the search criteria used in your last search, if you performed one.

3. (M) View > Query By Example > Run to perform the search.

4. (M) View > Query By Example > Cancel to cancel from Enter Query mode.

How to Obtain a Query Count

1. Perform steps 1 and 2 above.

2. (M) View > Query By Example > Count Matching Records to display the number of records a Query By Example search would retrieve.

Query Operators

Operator	Meaning	Example	
=	Equal to	= 'Janet'	= 107
!=	Not equal to	!= 'Janet'	!= 107
>	Greater than	>99.1	> 'Joan'
>=	Greater than or equal to	>=55	
<	Less than	<1000.00	
<=	Less than or equal to	<= 100	
#BETWEEN	Between two values	#BETWEEN 1 and 100	

Using Query Operators and Wildcard Characters

You can use any of the query operators listed in the table shown in the slide. You can also use the percent "%" wildcard character to represent any character or group of characters. For example, use "Manuf%" to represent Manufacturing, Manufacturer, and so on. You can also use the underline "_" character to represent any single character. For example, "Product_" can represent ProductA, or Product1.

Query Versus Find

Query Mode	Find Mode
Menu bar, [F11]	Menu bar, Toolbar
Existing window	Find window
Wildcards	List of values
Query count	No find count

Query Mode

In Query mode, you can use the menu bar to access a query, or you can use keyboard shortcuts, [F11] to enter a query, and [Ctrl] + [F11] to execute a query.

You use the existing window to prepare your search criteria for the query. You can enter specific information into any field to narrow your search.

When using wildcards to prepare your search criteria, you can use all query operators to narrow your search.

In query mode, you can check to see how many records match your criteria even before retrieving the data that matches your query.

Find Mode

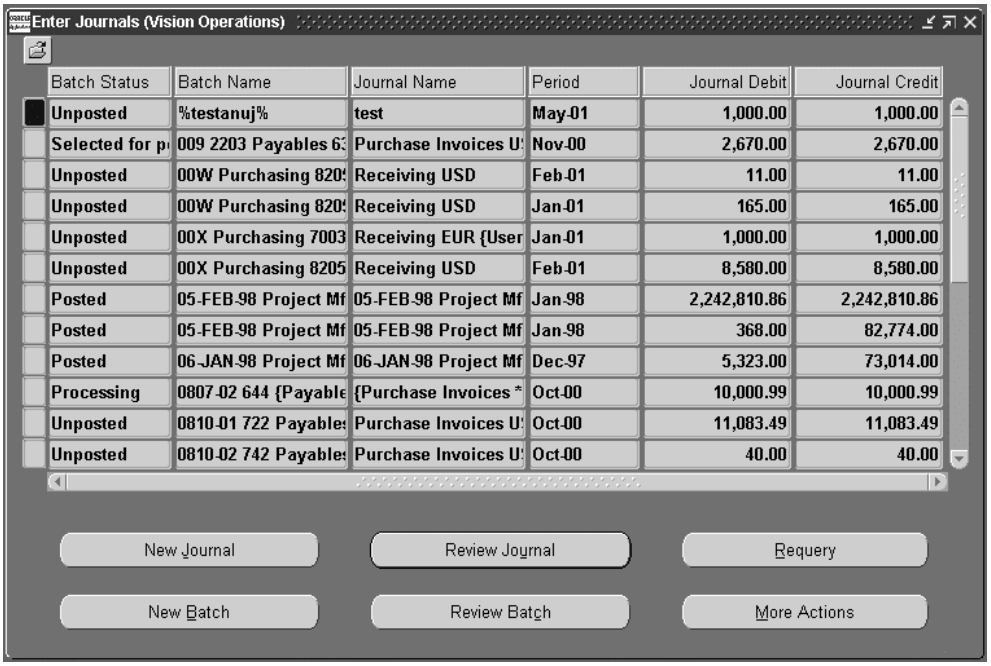
In Find mode, you use the menu bar to access the Find window, or you click the icon on the Toolbar.

You use a new window, the Find window, to prepare your search criteria.

The list of values is available in many fields in Find mode.

The Query Count feature is not available in Find mode.

Retrieved Records



Reviewing Your Data

After a search, Oracle Applications retrieves any records that matched your search criteria. Always enter the most selective search criteria that you can.

How to Review Retrieved Records

Use the scroll bar to view additional records currently not visible on the screen in a multirecord block.

(M) View > Record First to see the first record.

(M) View > Record Last to see the last record.

Note: Scrolling through records and using the Record Last command uses significant system resources. Avoid this by entering selective search criteria.

Summary

- Using the Find window to perform a search
- Searching for existing data in an application using Query By Example
- Including wildcards and query operators in your search criteria
- Understanding whether to use Find or Query mode
- Reviewing records retrieved from a search

Practice Overview

- **In this practice you will use Find to locate a job applicant.**
- **You will use the Query mode to search for and view the records for all female active applicants in the database.**

Practice Instructions

- **Use Find mode to find the job applicant named Joe Smith.**
- **Find all active applicants that are female using Query mode.**
- **View the retrieved records.**

Practice Solution

• On the Personal Homepage, click on the Human Resources, Vision Enterprises link.

• (N) Recruitment > Applicant Quick Entry

• (M) View > Find…

• Enter criteria to find Joe Smith in the Find field, such as S%.

• (M) View > Query By Example > Enter.

• In the Status field, enter Active%. In the Gender field, select the Female option button.

• (M) View > Query By Example > Run.

• View the retrieved records by pressing [PageDn].

• (M) File > Close Form

Accessing Online Help

Lesson Objectives

After this lesson, you should be able to:

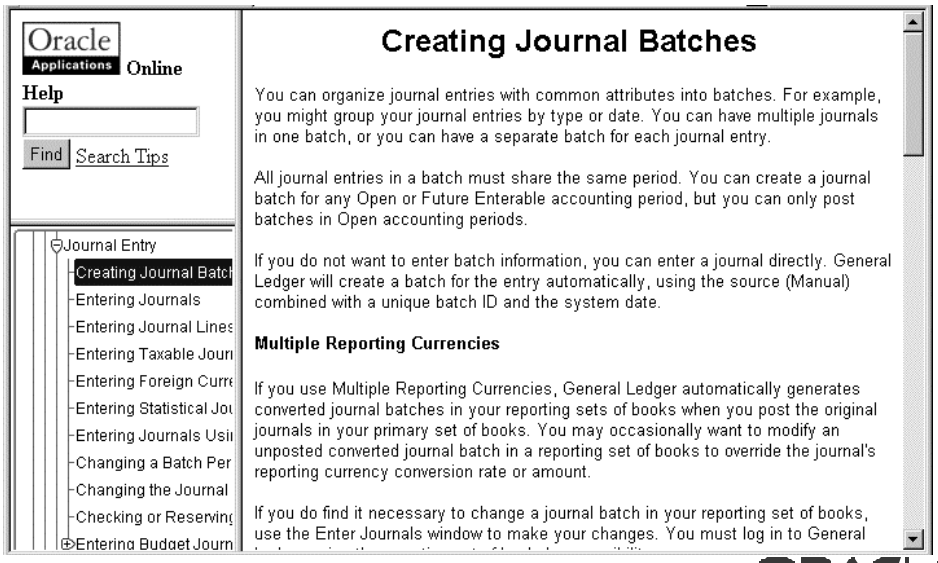
- **Display Help information online**
- **View explanations for application messages and errors**
- **Identify who created and updated a row of data**

Lesson Overview

The online documentation and help features can greatly enhance your ability to understand how to accomplish tasks using Oracle Applications. You can also determine how to identify the user responsible for the entry or maintenance of a record for further clarification of a business issue. This lesson explains how to obtain online information about the application and records.

Using Window Help

(M) Help > Window Help



Accessing Window Help

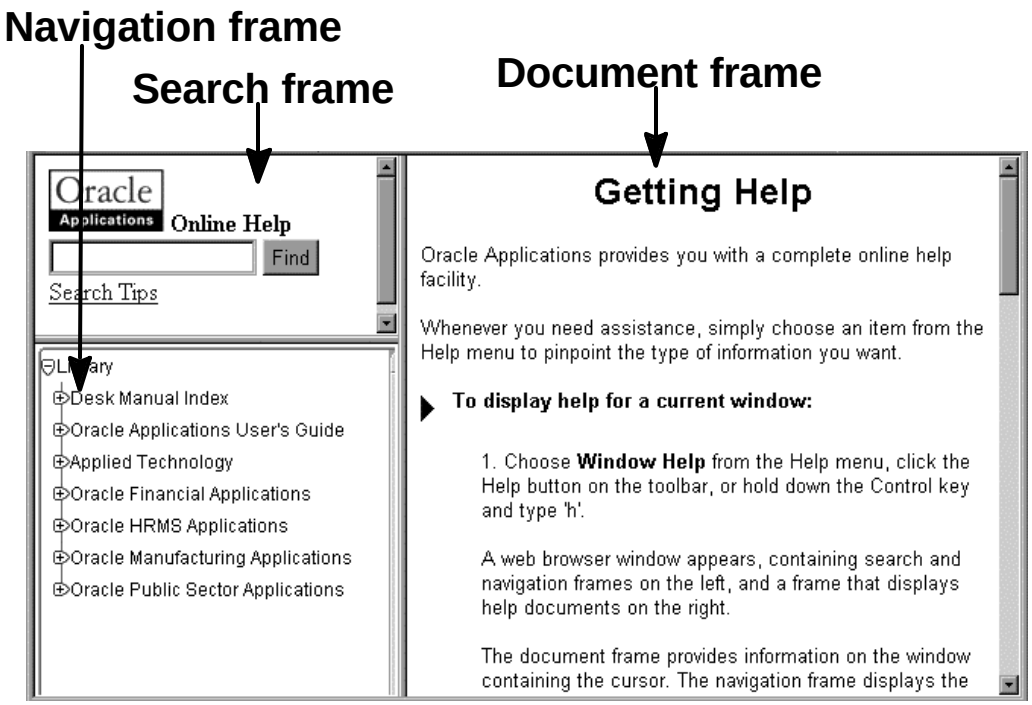
Oracle Applications provides you with a complete online help facility through your web browser tool.

How to Display Help for a Current Window

1. Select Help > Window Help. A help window is displayed, providing information and a list of topics associated with the current application window.

2. Click on a topic of interest to display more detailed information.

Using Online Help



Using the Web Browser Help Window

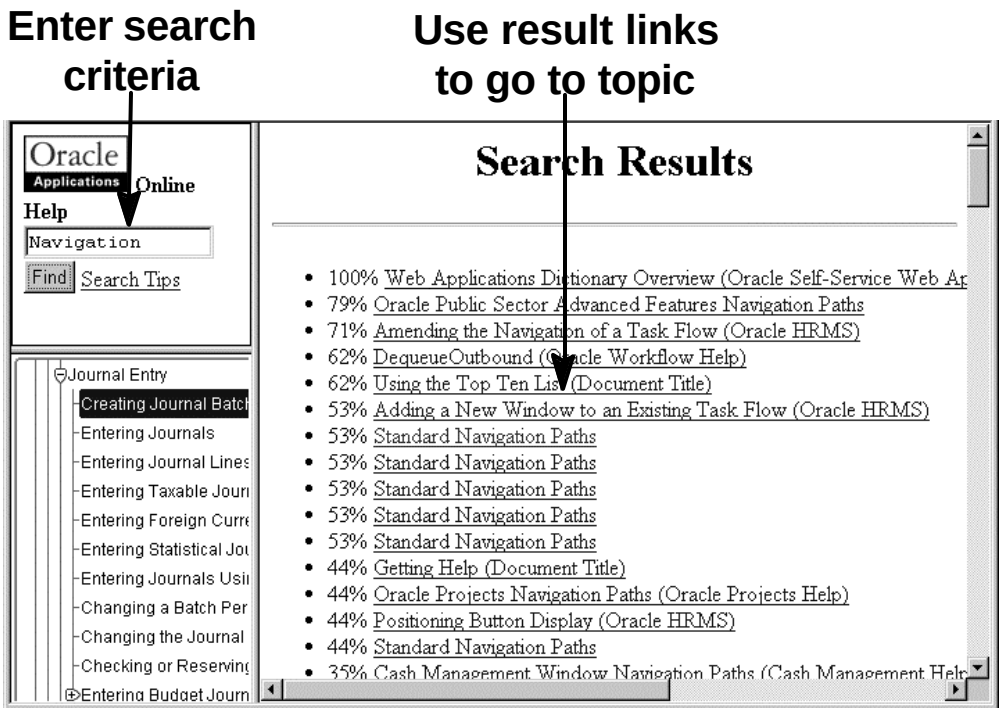
A Web browser window appears when you use the help system. This window contains search and navigation frames on the left part of the window, and a frame that displays the help information on the right side of the window.

The document frame can provide information on the application window containing the cursor, information on the topic selected in the navigation frame, or a list of topics that are a result of using the frame.

The navigation frame displays the top-level topics for your responsibility, arranged in a tree control.

If the document frame contains a list of topics associated with the window, you can click on a topic to display more detailed information.

Searching for Help Information



Searching

You can perform a search to find the Oracle Applications help information you want. Simply enter your query in the text field located in the top-left frame of the browser window when viewing help, then click the adjacent Find button.

A list of titles, ranked by relevance and linked to the documents in question, is returned from your search in the right-hand document frame. Click on whichever title seems to best answer your needs to display the complete document in this frame. If the document does not fully answer your questions, use your browser's Back button to return to the list of titles and try another

Review Question

To access online help you can do any of the following:

1. (M) Help > Window Help

2. Click the ? toolbar icon

3. Press [Ctrl] + [H]

4. All of the above

5. None of the above

Review Question Solution

To access online help you can do any of the following:

1. (M) Help > Window Help

2. Click the ? toolbar icon

3. Press [Ctrl] + [H]

4. All of the above

5. None of the above

Review Question

Where would you find help search results?

1. In the search frame

2. In the navigation frame

3. In the Search text box

4. In the document frame

5. In the status bar

Review Question Solution

Where would you find help search results?

1. In the search frame

2. In the navigation frame

3. In the Search text box

4. In the document frame

5. In the status bar

Search Syntax

Use this syntax . . .	To find files containing . . .
term	the word “term”
string*	words that begin with “string”
“words, and punctuation”	the precise phrase “words, and punctuation”
term1 OR term2 term1 term2	either term1 or term2
term1 AND term2 term1 +term2	both term1 or term2
term1 AND NOT term2 term1 -term2	term1, but not term 2

Using Search Syntax

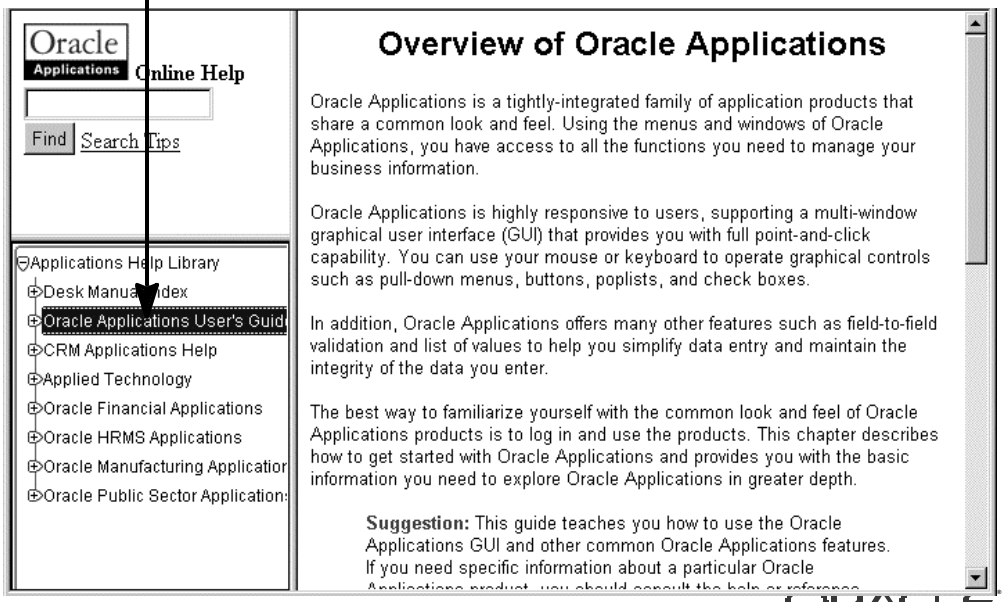
The search syntax to use in constructing your query can be any of those shown in the table in the slide.

Example

You want to know how to create a budget organization in Oracle General Ledger. You enter “budget organization” in the search field, and click Find. A linked list of help documents that contain this phrase appears in the document frame. You click on one that seems appropriate and start reading.

Oracle Applications Library

You can display help for any of the Oracle Applications products



The Library

You can access online help for any Oracle Applications product and you can reference that product's documentation online as well. All of the applications are listed in the navigation frame on the left hand side of the window.

Review Question

You can access Oracle Applications User's Guides online using the online help system.

True or False?

Review Question Solution

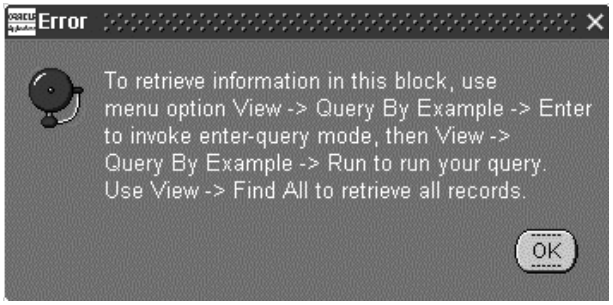
You can access Oracle Applications User's Guides online using the online help system.

***True* or False?**

Look in the navigation frame for the name of the guide.

Error Messages

- **To give you a hint, the application displays a short message in the message line.**
- **To inform you of an error, the application displays an error window.**
- **A History button also appears in the error window if an error of more serious nature occurs.**



Error Message Codes

Generally, messages and errors are preceded by a message or error code.

Codes that are prefixed by FRM arise from Oracle Forms, the underlying product that provides Oracle Applications with its graphical user interface.

Codes that contain the prefix ORA arise from the Oracle database.

Codes that are prefixed by APP arise from Oracle Applications.

These codes help your system administrator or Oracle support representative diagnose the errors that you may encounter.

Record History

(M) Help > Record History

Learning About a Record

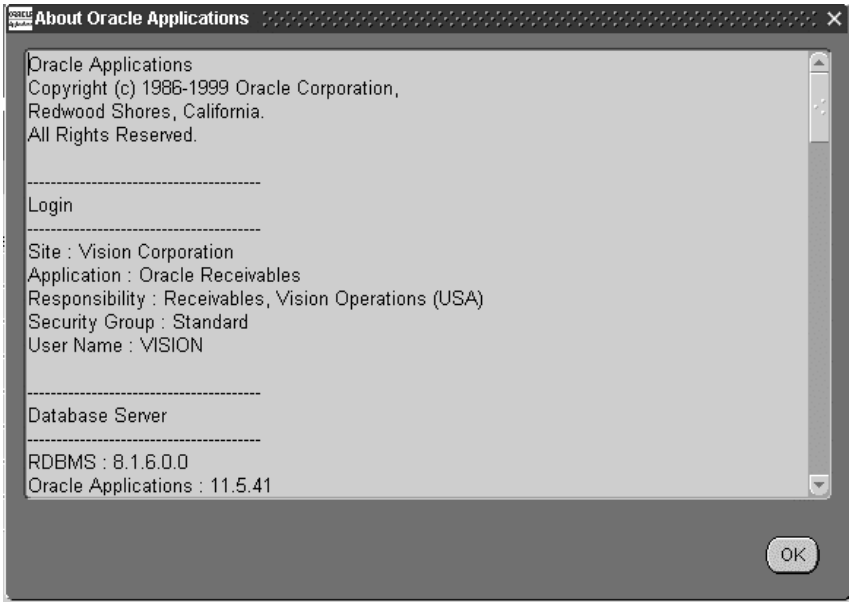
You can always display information about a record that has been previously saved. This record information includes who created the record, the date of creation, and the database table or view where the record resides. You can also learn who last changed the record using Oracle Applications, the date of the change, and that user's logon and terminal information (if the terminal information has been specifically designated by your system administrator).

How to Learn About the Current Record

1. (M) Help > Record History. A window appears that shows you information about the current record.
2. Click OK to close the window.

About Oracle Applications

(M) Help > About Oracle Applications



Information About Oracle Applications

You can obtain details about the version of Oracle Applications you are using, your login information, and details regarding the current form you are using by using the About Oracle Applications window. This information is useful if you have an error message and need assistance from your system administrator or Oracle support representative when you report a problem.

How to Display Version Information for Oracle Applications

1. (M) Help > About Oracle Applications.
2. Click OK to close this window when you are finished.

Summary

- Accessing online Help
- Using window Help
- Searching for Help information
- Finding Help for all Oracle Applications
- Viewing error messages
- Viewing Record History

Practice Overview

In this practice you will use Oracle Applications online help.

Practice Instructions

- **Using the Training Administrator responsibility, query up a job applicant's record and find out when it was last updated.**
- **Access online help to determine navigation paths for Oracle Applications.**
- **Search for help on using Query.**

Practice Solution

- (M) Help > Record History
- In the online help search box enter "Navigation Paths" and click Find.
- Type "Query" in the search text box and click Find. Click on the result link that best describes the topic you need.

Running Reports and Programs

Lesson Objectives

After this lesson, you should be able to:

- **Identify the features of concurrent processing and standard request submission**
- **Submit a report or program**
- **Define request sets**
- **View the progress of a concurrent request**
- **Check the status of a concurrent request**
- **Cancel or change a request**

Lesson Overview

To manage information in Oracle Applications, you must be able to run and monitor reports and programs. This lesson explains how to submit reports and processes, and monitor their status.

Concurrent Processing and Standard Request Submission

- **Concurrent Processing**
  - **Run non-interactive tasks, such as reports and programs.**
  - **Does not interfere with the interactive work you perform at your computer.**
- **Standard Request Submission (SRS)**
  - **Use the SRS interface to run reports and programs.**
  - **View report output online.**
  - **Schedule reports and programs.**
  - **View log information.**

Running Reports and Programs

Concurrent processing helps you satisfy the following business needs:

Continue working at your computer while running data-dependent reports and programs.

Fully use the capacity of your hardware by executing many application tasks at once.

Standard Request Submission lets you satisfy a related set of business needs. You can:

Use a standard interface to run your programs and reports.

Control access to different reports and programs.

View report output online.

Automatically run programs, reports, or request sets at specific time intervals.

View a log file that summarizes the completion information about all the reports and programs in a request set.

Definitions

Term	Definition
Concurrent Request	A request that you submit to run a concurrent program as a concurrent process
Concurrent Manager	A component of concurrent processing that monitors and runs tasks without tying up your computer.
Request Set	A collection of reports or programs that can be submitted as a set.
Stage	A component of a request set used to group requests in the set.

Concurrent Processing Terminology

Concurrent Request

A *concurrent request* is a request that you submit to run a concurrent program as a concurrent process. You issue a concurrent request when you submit a report or program to run using Standard Request Submission or when you click an action button in a product-specific submission window.

Concurrent Manager

A *concurrent manager* is a component of concurrent processing that monitors and runs requests without tying up your computer.

Request Set

A *request set* is a collection of reports or programs that you group together. You submit the reports or programs in a request set all at once using one transaction.

Stage

A *stage* is a component of a request set used to group requests within the set. All requests in a stage are run in parallel (all at the same time), while the stages themselves are run sequentially (one after the other) in the request set.

Definitions

Term	Definition
Parameter	In Standard Request Submission, a parameter is a report variable whose value you can change each time you run a report.
Concurrent Processing Options	Run options that you can change for your concurrent request.
Online Request Review	Review the output and log files from your concurrent requests online

Concurrent Processing Terminology (Continued)

Parameter

In Standard Request Submission (SRS), a *parameter* is a report variable whose value you can change each time you run a report. For example, you might run an account balance report and change the account number each time you run the report. The account number is the parameter for the report.

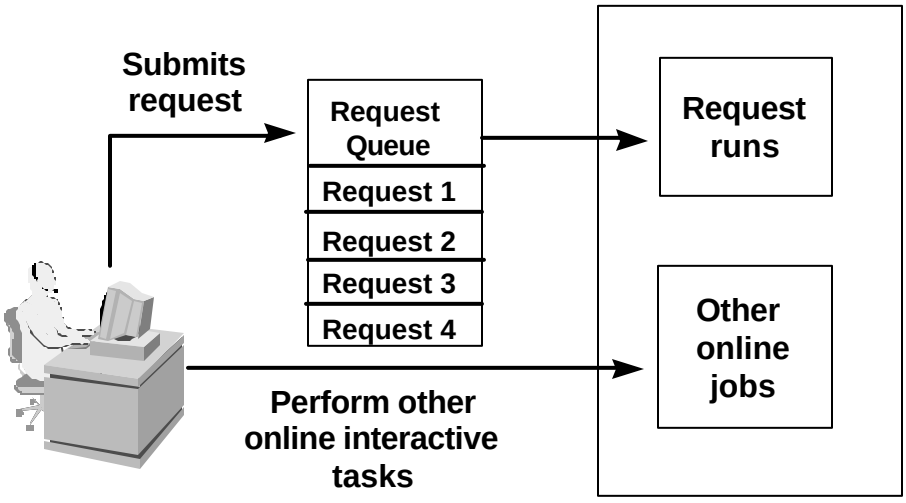
Concurrent Processing Options

You can control and change certain run options for each of your concurrent requests. Not only can you control and change the number of copies to print, which print style to use, and which printer to use, but you can also choose to hold a request from being run, choose a specific date or time to start a request, or choose to save the results of your concurrent request in a standard file format.

Online Request Review

You can review the output and log files from your concurrent requests online. You can see the results of a concurrent request without the delay of printing out the entire report or log file.

Using Concurrent Processing

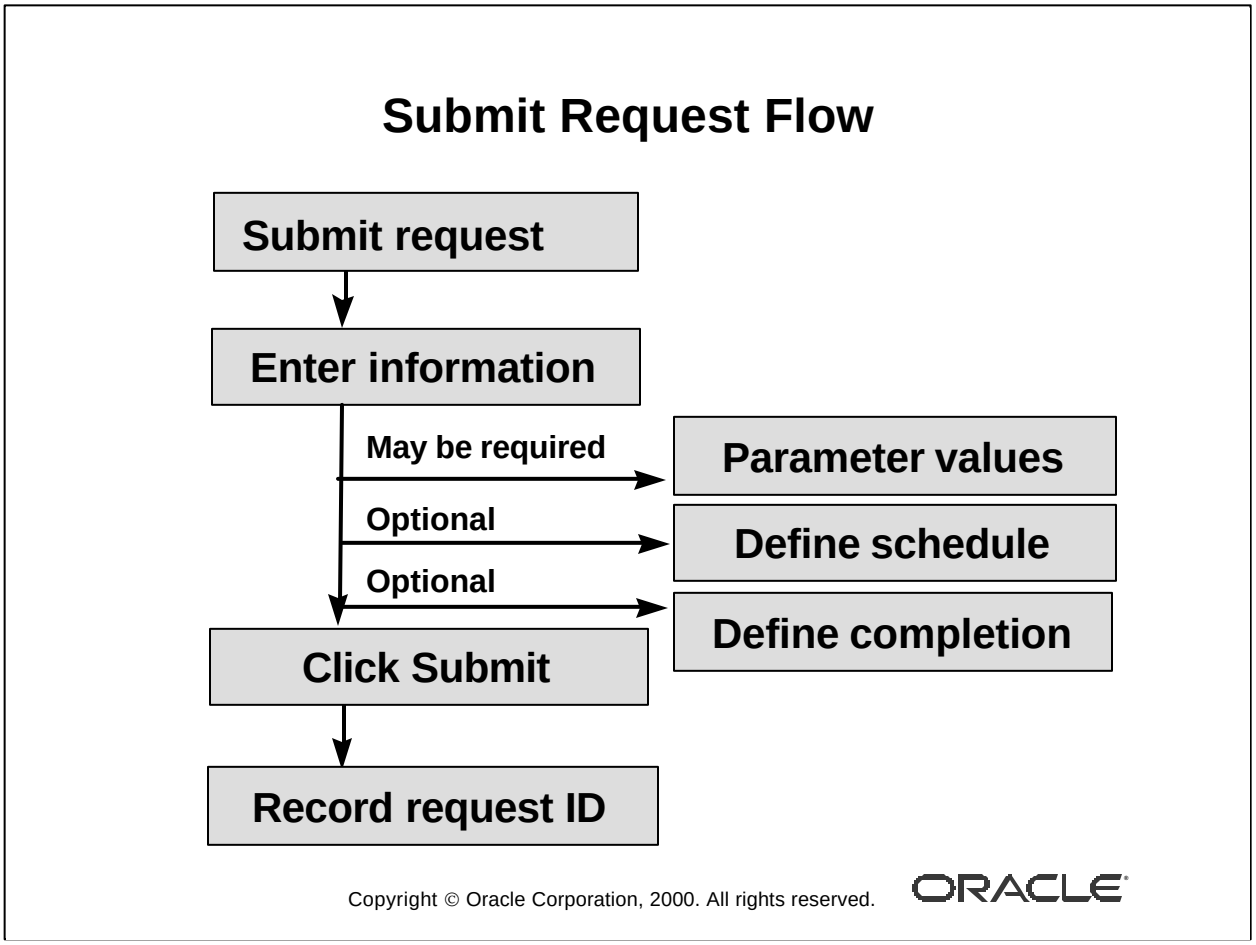


Using Concurrent Processing

You can run a noninteractive, data-dependent function such as a report or program, simultaneously with online operations. With concurrent processing, you can complete noninteractive tasks without interfering with the interactive work that you perform at your terminal.

An example of concurrent processing occurs when you use the Post Journals window in your Oracle General Ledger application. Once you specify the journal batches to post and click Post, your Oracle General Ledger application uses concurrent processing to post the journal batch entries without further involvement from you. Meanwhile, your terminal is still available for you to continue doing other work in Oracle Applications.

Oracle Applications runs all of its reports and programs as concurrent processes whether you submit them using the Submit Requests window, or using a product-specific submission window. Your system administrator can tailor concurrent processing to optimize the performance of Oracle Applications for you to ensure that your system is not overloaded with processing at any time.



Using Standard Request Submission (SRS)

Using Standard Request Submission gives you control over how you can run your requests and request sets.

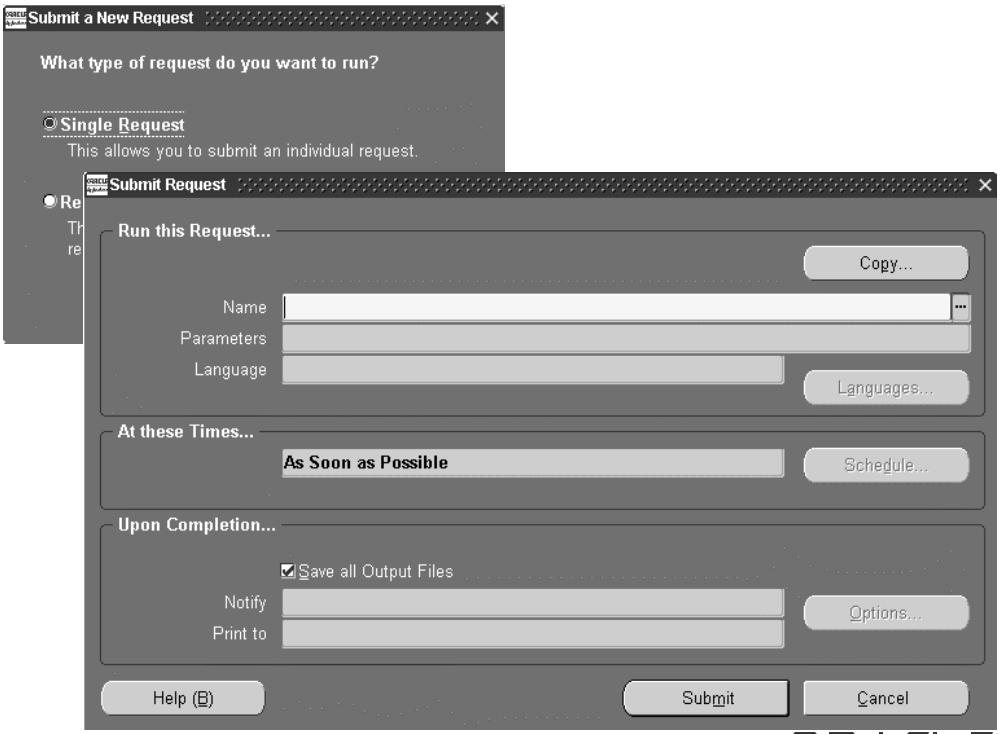
There are three elements involved in submitting a request: selecting the request or request set to be submitted, defining a submission schedule, and providing completion options.

Defining a schedule can be as simple as submitting "As Soon as Possible" or it can involve using a more complex schedule that you define when you first submit your request. The schedule may be used for other requests in the future.

Completion options enable you to deliver notification to others using Oracle Workflow, and specify which printers, and how many copies of the output you want to produce for each request.

You can submit as many requests as you like from the Submit Request window. You can even submit a request more than once if you want to run the same request with different parameter values.

Submitting a Request



How To Submit a Request and Define Parameters

1. Navigate to the Submit a New Request window.

2. Check the Request option to submit single requests, or choose to submit a predefined group of requests by checking Request Set.

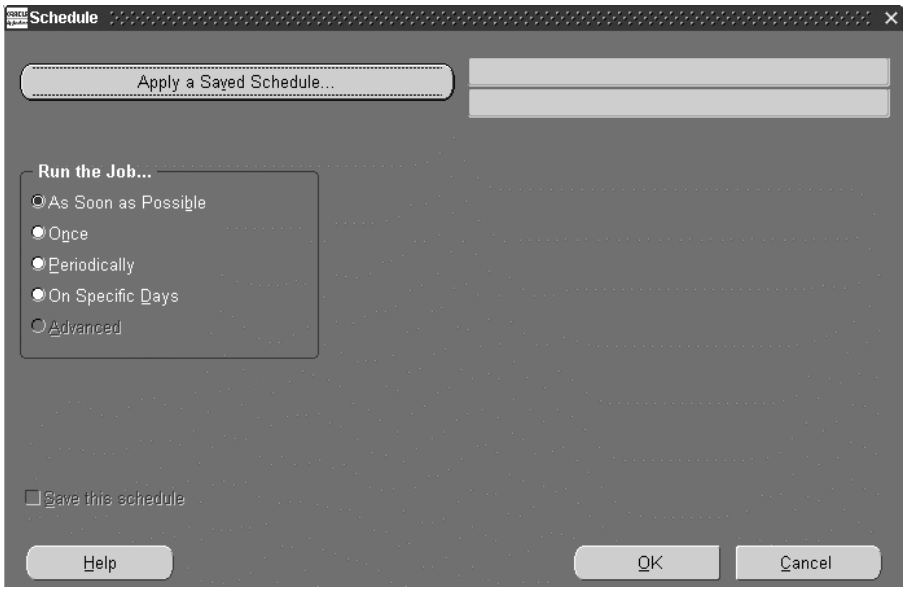
3. Click OK.

4. Use the Copy button to take advantage of previously entered request submissions. Or, select the Name of the request (report or program) that you want to run from the list of available requests. Note that the responsibility you are using determines the request group and the requests that will appear in the list.

5. A Parameters window automatically appears if you select a request that requires parameter values. The prompts in the Parameters window are specific to the request that you select.

6. Enter the values in the required parameter fields and click OK. The Parameters window closes, and your parameter values are concatenated and displayed in the Parameters window.

Submission Schedule



Defining a Submission Schedule

1. Click Schedule to open the Scheduling window.

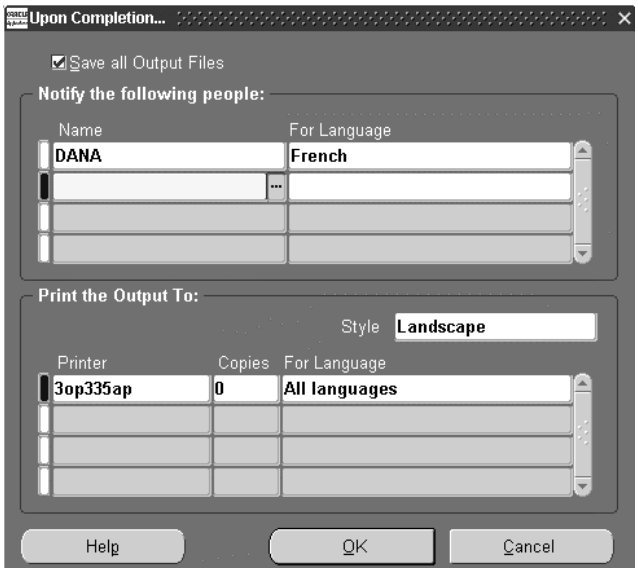
The scheduling window provides you with several scheduling options. You can choose to re-use a schedule you previously defined and saved, or define a new schedule. You can define your schedule to run a request as soon as possible, at a specific time, or repeatedly at specific intervals, on specific days of the week or month.

2. Choose a type of schedule.

3. To save your schedule, select the "Save this schedule for use again later" check box. You must also provide a unique name for each schedule you save, and you can provide additional information in the Description field.

4. Click OK. You are returned to the Submit Requests window.

Upon Completion



Defining Completion Options

1. In the Upon Completion region of the Submit Request window, check the Save all Output Files checkbox to write your request to a file. If you want to view your report online, you must use this check box.

2. Click the Options button.

Specify additional people to notify using Oracle Workflow, upon completion of this report. You can also specify a language for the person if multiple languages are installed.

3. Select a print style.

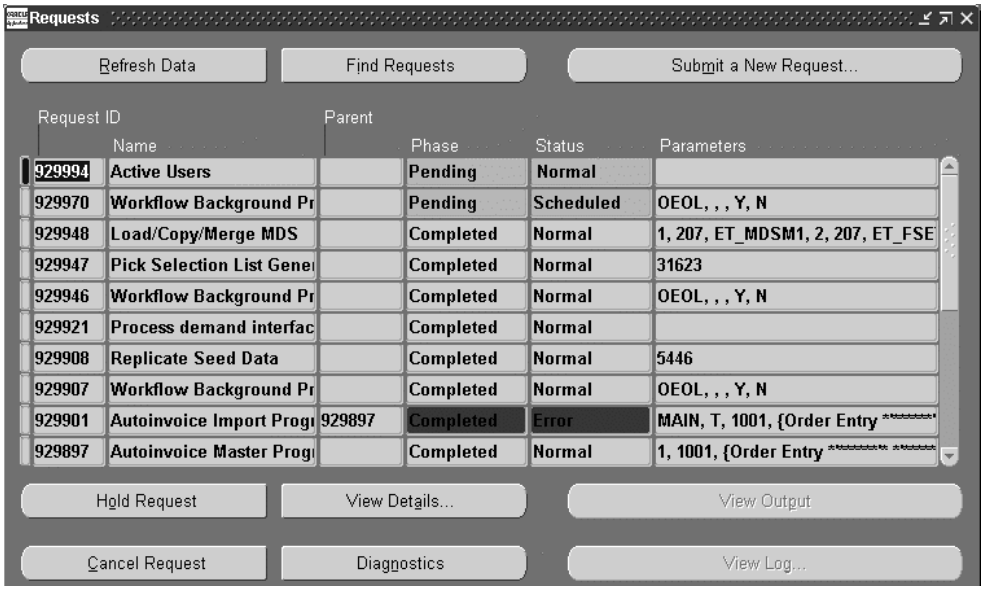
4. Use the LOV to select the printers and languages you want used to produce a hardcopy of your report.

5. Enter the number of copies.

6. Click OK.

7. Click Submit Request when you are finished specifying scheduling and completion options.

Requests

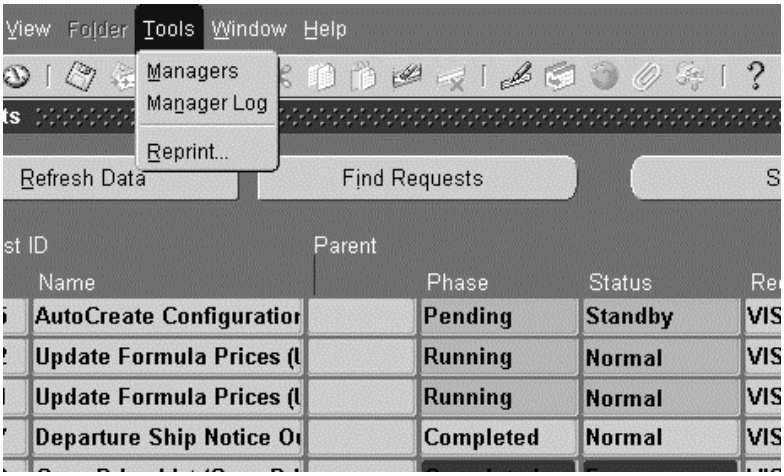


Finding Your Request Using the Request ID

After your request is submitted, Oracle Applications assigns a request ID to each request submission so that you can identify the results of the request when it is complete.

You can use the request ID to query for your request output in the Requests window. Oracle Applications also assigns a new request ID number to each resubmission of a request and displays the request ID in the log file of the previous request.

Reprint



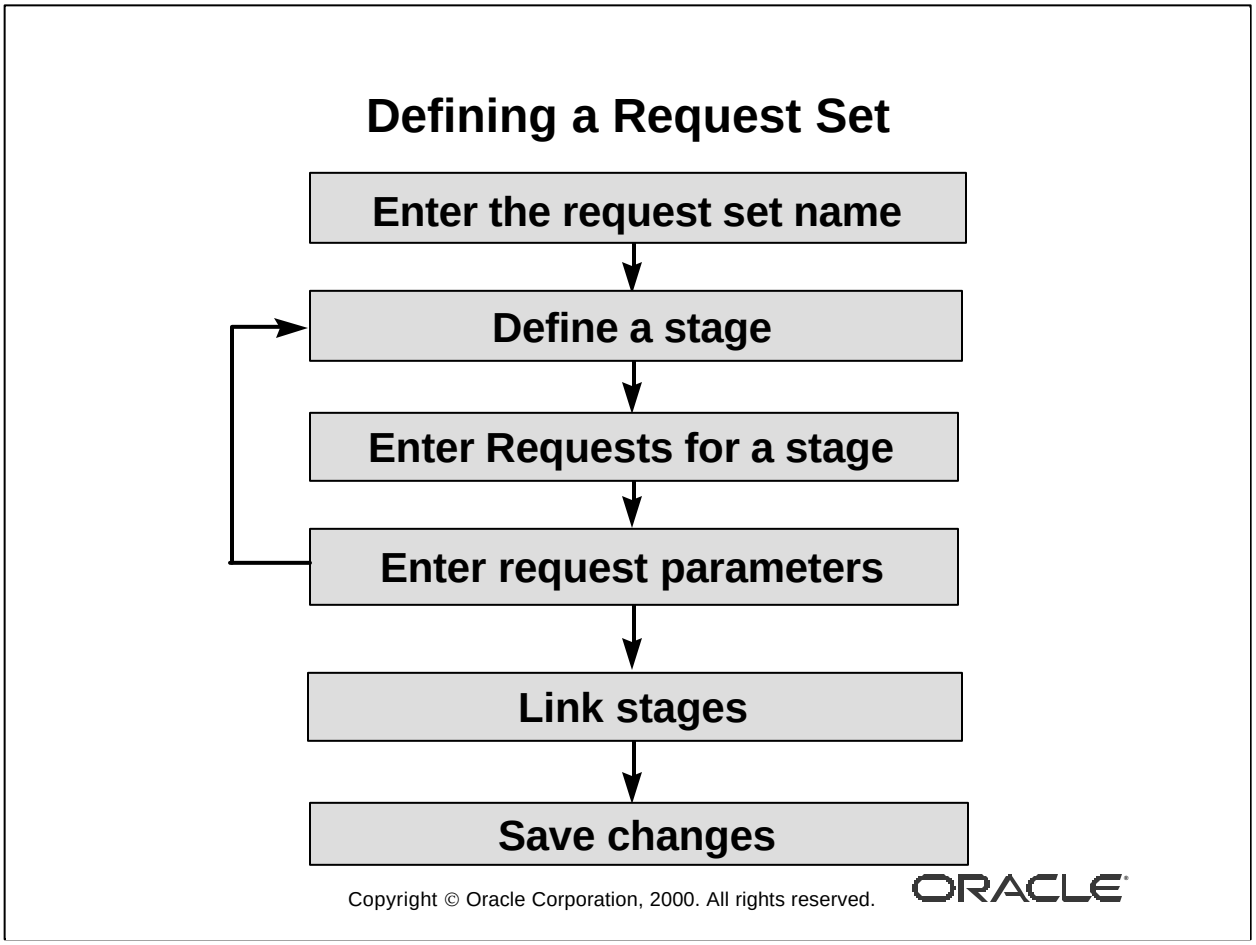
Reprinting a Report That Has Already Been Run

1. Navigate to the Requests window.

2. Query your request so that it is displayed as a record in the Requests window.

3. Select the specific request that you want to reprint.

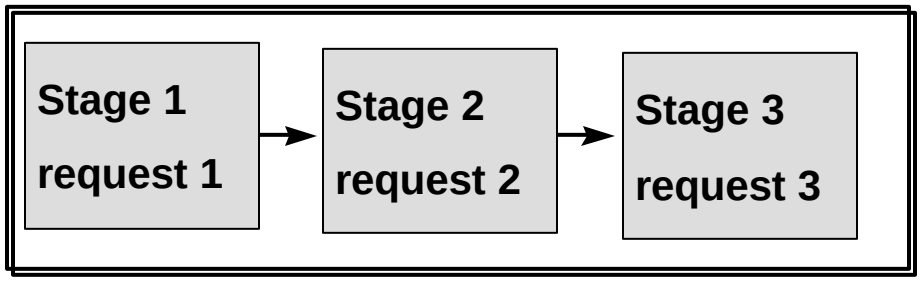
4. To reprint a report, select Tools > Reprint from the menu.

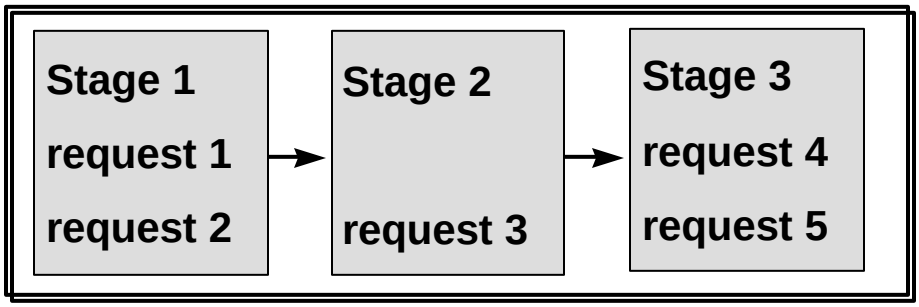


Defining Request Sets

By defining request sets, you can submit the same set of requests regularly by using a single transaction. You use the Request Set window to create and edit request sets. You can also use the Request Set Wizard to create simple request sets.

Request Set Stages





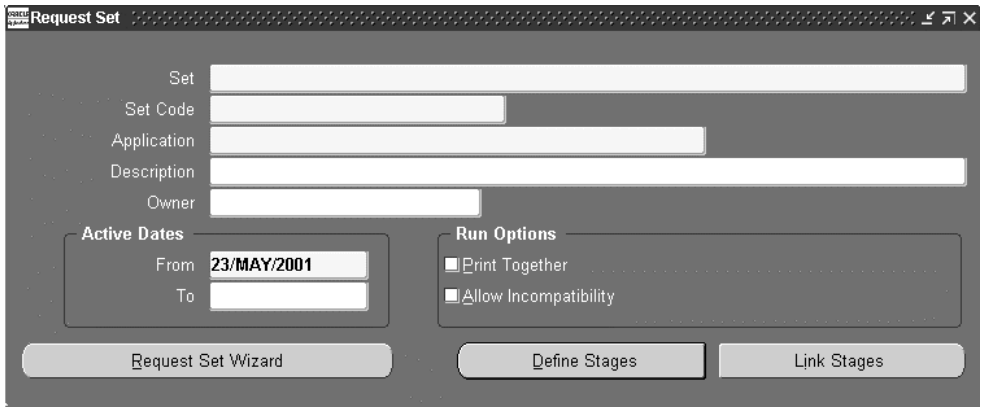
Organizing Requests with Stages

Request sets are divided into one or more *stages* which are linked to determine the sequence in which your requests are run. Each stage consists of one or more requests that you want to run in parallel (at the same time in any order). For example, in the simplest request set structure, all requests are assigned to one stage. This allows all requests to run in parallel.

To run requests in sequence, you assign requests to different stages, and then link the stages in the order you want the requests to run.

The concurrent manager allows only one stage in a request to run at a time. When one stage is complete, the next stage is submitted. A stage is not considered complete until all of the requests in the stage are complete. One advantage of using stages is the ability to run several requests in parallel and then move sequentially to the next stage. This enables you to create more versatile and efficient request sets.

Request Set



Defining Request Sets

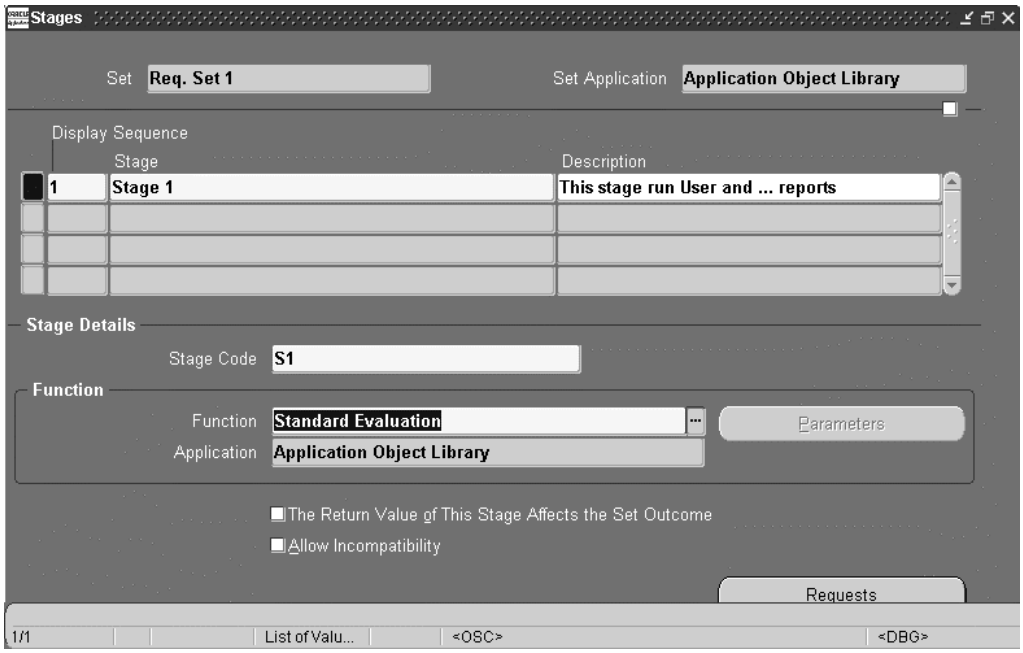
By defining request sets, you can submit the same set of requests repeatedly using a single transaction. Use the Request Set window to create and edit request sets.

1. Navigate to the Request Set window.
2. Enter a Name for your request set.
3. Enter a Short Name for your request set. This name is used internally to reference your request set.
4. Enter the Application with which you want to associate your request set.
5. Enter a Description of your request set if you like.

   The Owner field defaults to your username and can only be changed by your system administrator.

6. Enter the Active Dates From and To fields to define an effective period when you and others can run the request set. If the current date is outside the range you define, the request set will not be available in the Submit Requests window.
7. Check the Print Together check box to send all your requests to the printer together when they complete, or uncheck the check box to send each request one at a time to the printer as it completes.
8. Check the Allow Incompatibility check box to allow your system administrator to specify programs that this request is incompatible with (may not run with). Leave Allow Incompatibility unchecked to specify that this request set may run with all other concurrent requests or request sets.
9. Choose Define Stages or Link Stages if you have finished defining your stages. See Defining Stages or Linking Stages.

Stages



Defining Stages

The value for the Display Sequence is defaulted in sequence as you enter your stages. You may change the display order of the stages by modifying the field.

1. Enter a name for the stage.

2. Enter a Description for your stage.

3. Enter a Short Code for the stage. This code is used internally to reference the stage.

4. Use the LOV in the Function field to select a function. The default value for this field is the Standard Stage Evaluation function. This function bases its completion status on the normal completion status of the requests it contains.

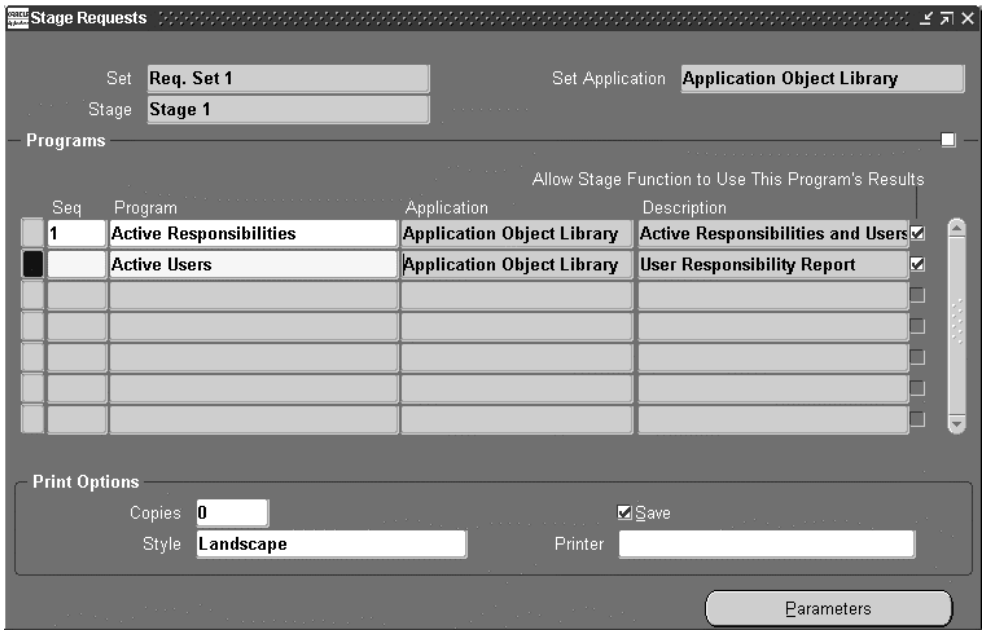
5. Use the Return Value of this Stage Affects the Set Outcome check box if you want to ensure that the request set's completion status is equal to the completion status of this stage.

> **Note:** If you select this box for more than one stage, the completion status of the request set will equal the completion status of the *last* of these stages to run in the set.

6. Use the Allow Incompatibility box as described above, to determine if this stage is incompatible with other concurrent processing programs.

7. Click Requests to display the Stage Requests window.

Requests in a Stage



Adding Requests to a Stage

In this window you define which requests you want to include in this stage.

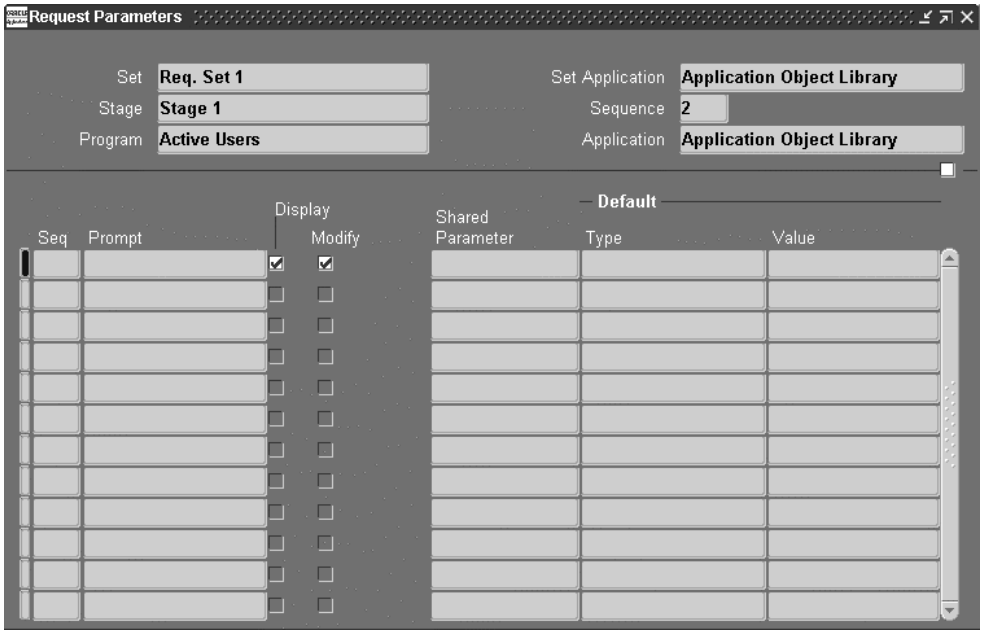
1. Select the report or program you want to include in your request set. Note that the description of the request you choose and its associated application appears in the Description and Application fields.

2. Specify the number of Copies of output to print, the Style to print, the Printer to print to, and whether to save the output to an operating system file.

3. Use the Allow Stage Function to Use This Program's Result's check box to indicate which programs or reports should be included.

4. Click Parameters to display the Request Parameters window.

Request Parameters



Request Parameters Window

The Request Parameters window lets you customize the parameter values of a specific request in a request set. The fields at the top of the Request Parameters window list general information about the current request set and the request for which you can customize the parameter values.

The multi-row portion of the window lists the parameters for that request.

How to Define Parameters for the Requests

1. The Sequence field displays the order in which each request parameter appears when you run the request in the Submit Requests window (lower numbers appear before higher numbers). Only your system administrator can change a parameter's order.

The Prompt field is a display-only field that shows the request parameter's prompt.

2. Check the Display check box to specify that you can see a request parameter at submission time, or uncheck the check box to specify that a parameter should not be displayed at submission time.

3. Check the Modify check box to specify that you can insert or change the value for a request parameter at submission time, or uncheck the check box to specify that a parameter cannot be changed at submission time.

4. Use the Shared Parameter field to set a default value for a parameter that occurs in more than one report or program of a request set. Once you enter the same parameter label in the Shared Parameter field for each occurrence of the same parameter, the value that you assign to the first occurrence of the parameter becomes the default value for all subsequent occurrences of the parameter. The shared parameter label simply enables you to set an initial default value for all occurrences of the same parameter so you can avoid typing the same value all over again for every occurrence of the parameter.

5. Optionally enter a Default Type and Value for the parameter.

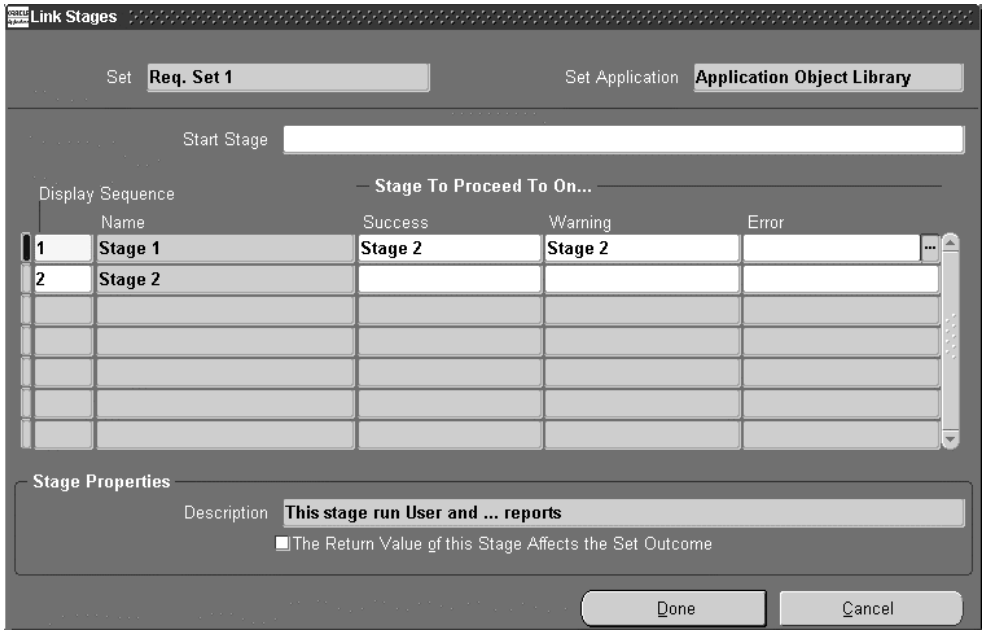
6. Save your work.

7. Go back to the Stage Requests window to add more requests to the request set stage.

8. You can select a request more than once if you want to run the same request with different default parameter values.

9. To start a new stage, return to the Stage window and choose New Record from the File Menu.

Link Stages



Linking Stages

Now that you have defined your stage or stages, you will need to link them in the order that you want them to run.

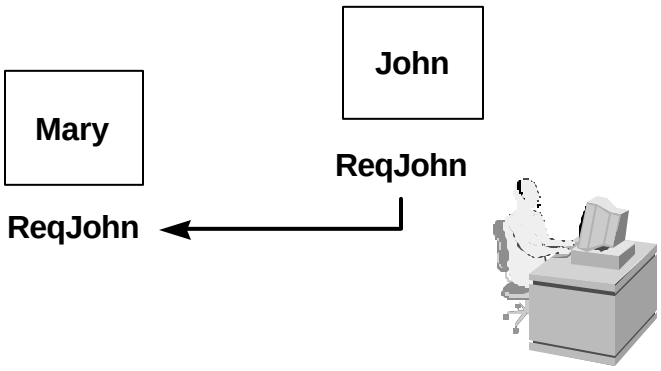
How to Link the Stages

1. Navigate to the Requests Sets window.

2. Enter the Start Stage. The stage you enter here is the first stage submitted for the request set.

3. Enter the stages you want to run following the first stage in the Success, Warning, and Error columns. To ensure that a particular stage follows the preceding stage regardless of the completion status, enter the desired stage in all three columns. To stop the request set if a stage ends in Error, leave the Error column blank. Any time you do not specifically indicate which stage should follow for a completion status, the request set will exit on that completion status. In the following example, the request set will always exit if any stage returns a completion status of error. In addition, stages C and D will terminate the request set regardless of their completion status. If Stage A returns a status other than Error, Stage B will be submitted. Finally, when Stage B completes with a status of Success, it is followed by Stage C, or if the status is Warning, Stage D will follow.

Example of Assigning Request Sets



- **The System Administrator assigns the request set called *ReqJohn* to Mary's responsibility group.**
- **Now Mary can run John's *ReqJohn* request set.**
- **Anyone else in that responsibility group can run ReqJohn.**

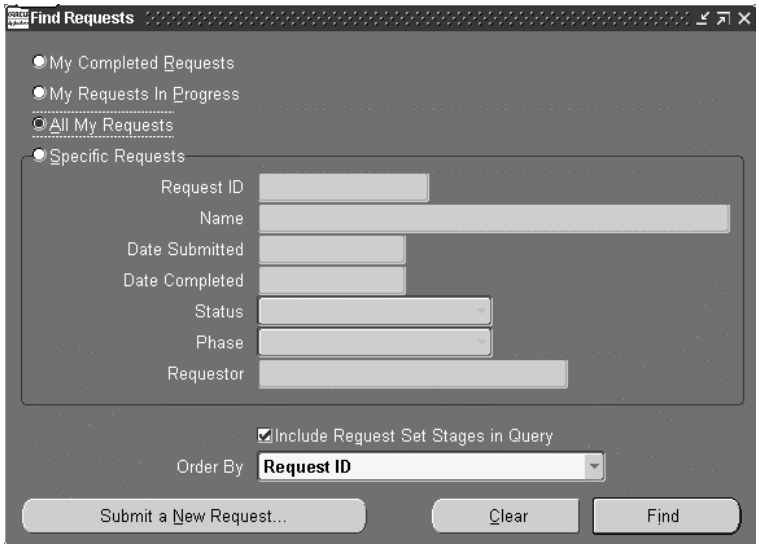
Using a Request Set

After you define a request set, it becomes your private request set. You can run it as long as you have access to a standard Submit Requests window that does not limit access to specific requests.

Other users can run the request set only if your system administrator assigns the request set to their responsibility's request group. It is possible to have a request set in your request group that contains individual requests that are not in your request group.

You can only edit request sets that you own. You can add any requests in your request group to the request set. You can delete any request from the request set, regardless of whether that request is in your request group. To update information about an individual request in the request set, however, the request set must be in your request group.

Finding Requests



Viewing and Changing Requests

Since all reports, programs, and request sets are run as concurrent requests in Oracle Applications, you can navigate to the Request window to view the progress and output of all your concurrent requests, and you can change aspects of a request's processing options.

You can use the Request window (summary and detail) to view a list of all the submitted concurrent requests, check whether your request has run, change aspects of a request's processing options, diagnose errors, or find the position of your request in the queues of available concurrent managers.

How to Use the Request Window

1. Upon initial navigation to the Requests window, you are directed to the Find Requests window.

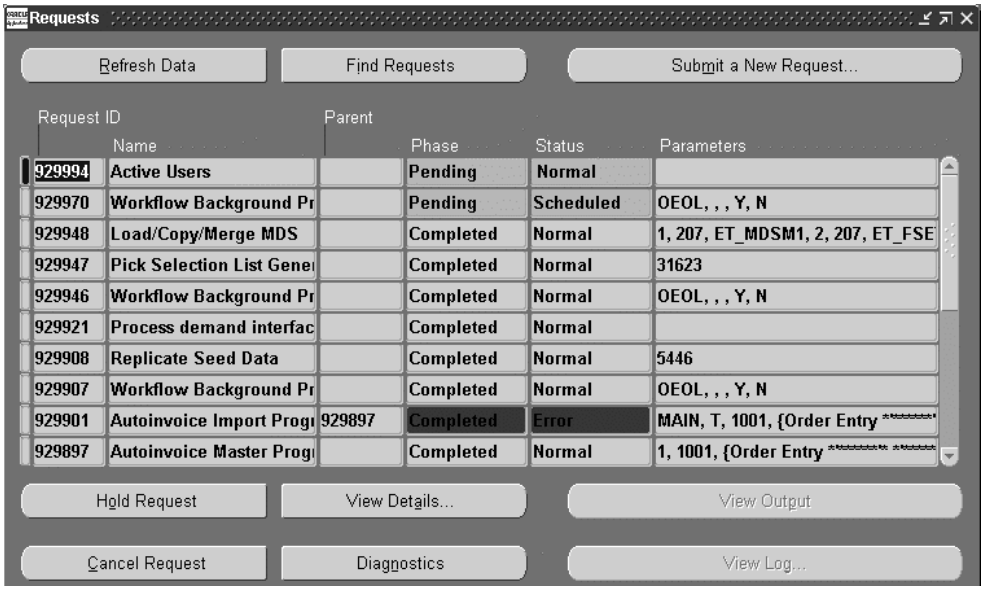
2. Use the Find Requests window to specify the types of requests you want to see. You can choose to view your completed requests, your requests in progress, or all of your requests by selecting the appropriate option group.

In addition, you can look for a particular request using the Specific Requests option group. Use the find criteria fields as you would for any other find window to specify as many or as few details as you need to locate the desired request information. Navigate to the Find Request window.

3. Enter specific criteria in the Find window that appears, or click Find to display all of your requests that you have submitted.

4. Use the Order By poplist to specify the order in which you want your requests displayed.

Requests



Performing Concurrent Processing Tasks

You can click various buttons in this window to perform tasks relating to concurrent processing.

Refresh Data button: The Requests window will not automatically refresh in order to display updated progress of your request. Use this button to requery the lines in the request table.

Find Requests button: Displays the Find Request window to perform a search for additional requests

Submit a New Request button: Displays the Submit Requests window to submit a new request to the concurrent manager

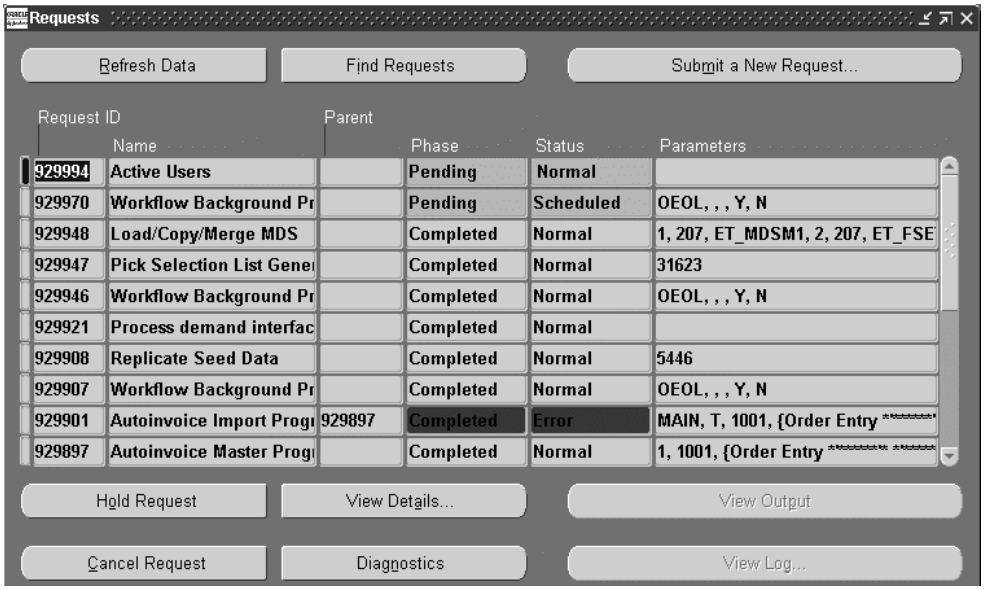
Hold Request and Cancel Request buttons: These buttons illuminate if the concurrent manager has not already begun running the program. You can Hold or Cancel a request by using these buttons. If the request is already running the Cancel button will terminate the request.

View Details button: Displays the Details window to view detailed information about your request, for example, submission dates, scheduling and other information. If a request has not already run, you can change selected fields so that the updated information will affect your request when it is run by the concurrent manager.

Diagnostics button: Displays diagnostic information about your request such as when it ran and if it completed successfully.

View Output button: Displays an online format of your report.

Requests



Performing Concurrent Processing Tasks (Continued)

Note: Reports that produce an output other than a text file (for example HTML or PDF) are displayed in a browser. If you set the profile option VIEWER: TEXT to Browser, your text files are also displayed in a browser as opposed to the Report Viewer. VIEWER: TEXT may also be set to display your output in a text editor such as Microsoft Word, or in a spreadsheet such as Microsoft Excel.

View Log button: Displays information about the request regarding arguments used and other technical information

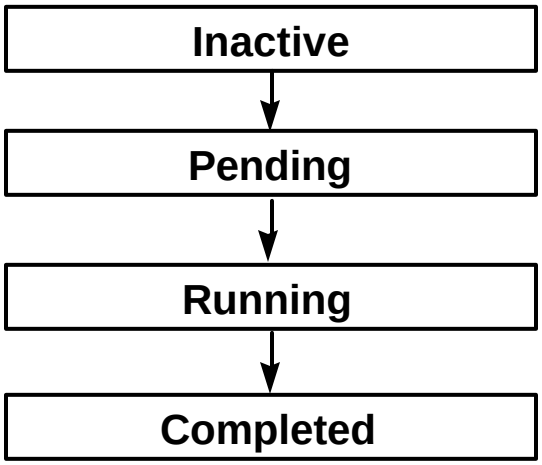
Screen colors help you identify the status of the request.

Green: Pending, running or scheduled requests

Yellow: Completed requests with a status of Warning

Red: Requests that complete with a status of Error

Four Phases of a Concurrent Request



Phase and Status for a Concurrent Request

The Concurrent Requests Summary window displays a phase and status summary for each concurrent request listed in the window.

A concurrent request has a life cycle consisting of the following phases:

Pending: The request is waiting to be run.

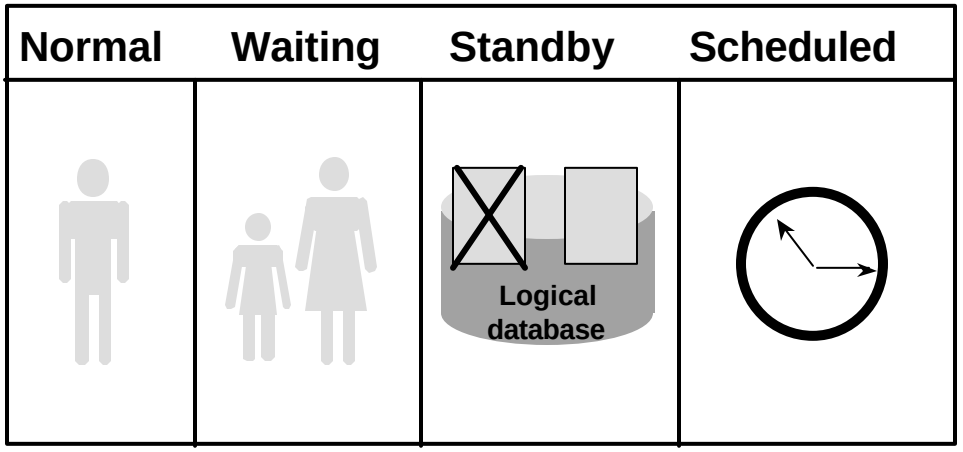
Running: The request is running.

Completed: The request has finished execution.

Inactive: The request cannot yet be run.

During each phase, a concurrent request has a specific condition or status. The table lists each phase/status combination and describes its meaning in relation to a request.

Pending Phase



Pending Phase

A program in the Pending phase can be in one of four statuses:

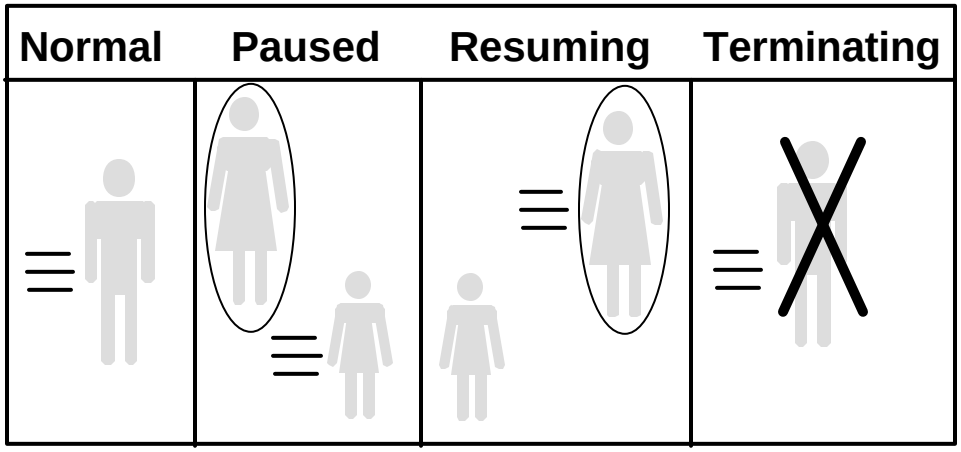
Normal: The program is waiting for an available manager.

Waiting: A child program is waiting for a parent to mark it ready to run.

Standby: A program is waiting for another incompatible program in the same logical database to complete.

Scheduled: A program's scheduled start time has not yet elapsed.

Running Phase



Running Phase

A program in the Running phase can be in one of four statuses:

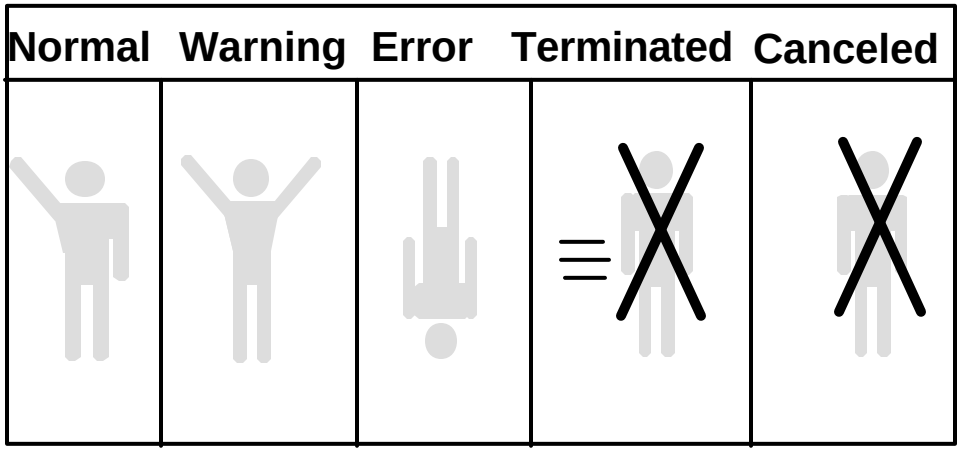
Normal: Program is in progress.

Paused: A parent program is waiting for one or more child programs to complete.

Resuming: A parent program is continuing after the completion of one or more child programs.

Terminating: The program is being terminated.

Completed Phase



Completed Phase

A program in the Completed phase can be in one of five statuses:

Normal: Program completed successfully.

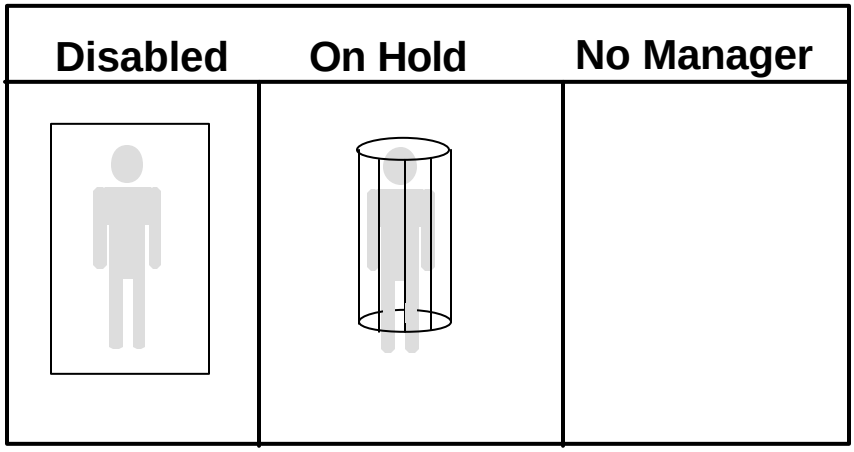
Warning: Program completed successfully but with warning messages.

Error: Program failed to complete successfully.

Terminated: A running program was terminated.

Canceled: A pending or inactive program was canceled before it started.

Inactive Phase



Inactive Phase

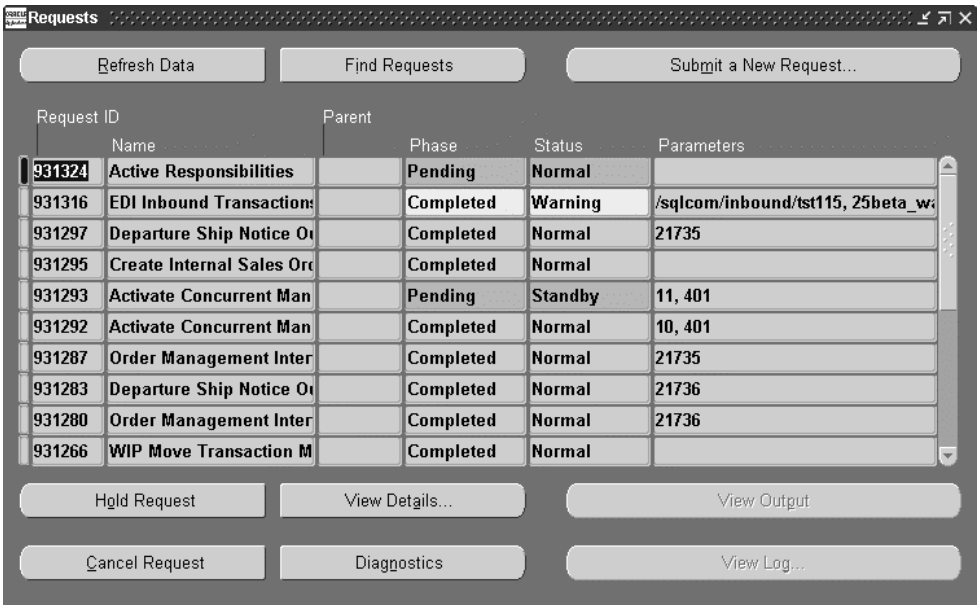
A program in the Inactive phase can be in one of three statuses:

Disabled: The requested program has not been enabled for execution.

On Hold: The requested program has been placed on hold.

No Manager: There is no manager defined to run this type of request.

Canceling or Holding Requests



Canceling or Holding a Request That Has Not Yet Completed

1. Navigate to the Requests window.

2. Select the Specific Request option button and enter the Request ID or other appropriate search criteria or select another appropriate option.

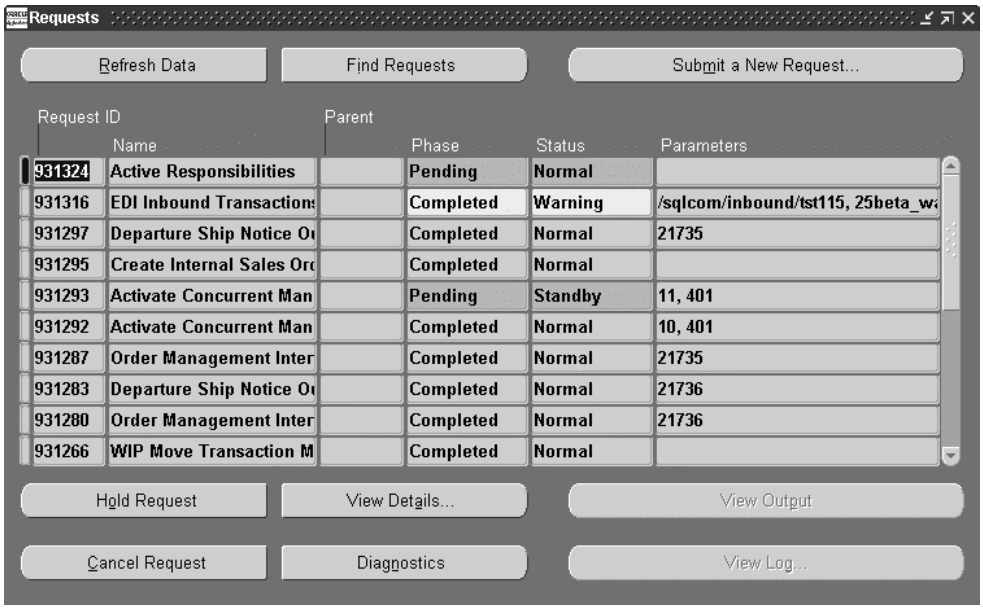
3. Click Find.

4. With the cursor on the request you want to cancel, click Cancel request. If the request is in Pending or Inactive phase, click Cancel Request or Hold Request to either cancel the request or put the request on hold. If the request is in Running phase, click Cancel Request to terminate the request.

> If you cancel a request set, then Oracle Applications will automatically cancel all requests in the set.

5. Choose Save from the File menu.

Changing Request Options



Changing Request Options

If your request or request set has not started running, you can change how your request or request set runs and prints its output by using the Requests window

How to Change the Request Options of a Request or Request Set

1. Navigate to the Requests window.

2. Use the Find window to search for your request or request set ID.

3. Click Hold Request to put your request on hold.

4. You can change the start date and time for your request or request set. If the request is Pending or Scheduled, you can change the printer, the number of copies you want to print, and whether Oracle Application saves your report output to an operating system file. You can also change resubmission options in this window.

Summary

- Standard Request Submission (SRS)
- Concurrent manager and concurrent processing
- Submitting Concurrent requests
- Defining Request sets and stages
- Managing requests
- Checking status information
- Canceling or changing a request

Practice Overview

In this practice you will use Standard Request Submission to run an Oracle Accounts Payable Trial Balance report.

Practice Instructions

- **Log on using the Payables, Vision Operations responsibility.**
- **Using the Requests window, run the Accounts Payable Trial Balance report as soon as possible. Use system defaults for required fields.**
- **View your request. Keep refreshing the display until your report completes.**
- **View the output online.**

Practice Solution

• Choose the Payables, Vision Operations responsibility link on the Personal Homepage, or (M) File > Switch Responsibility and choose it from the list.

• To get to the Requests window, (N) Other > Requests > Run.

• In the Submit a New Request window, select the option Single Request.

• When the Requests window appears, use the list of values to enter Accounts Payable Trial Balance Report in the Request Name field.

• Click the Submit button and your request goes to the queue to run.

• (N) Other > Requests > View, select All My Requests and click Find.

• Click the Refresh Data button to view the progress of your report until it completes.

• Click the View Output button to see the report on your screen.

Customizing the Presentation of Data

Lesson Objectives

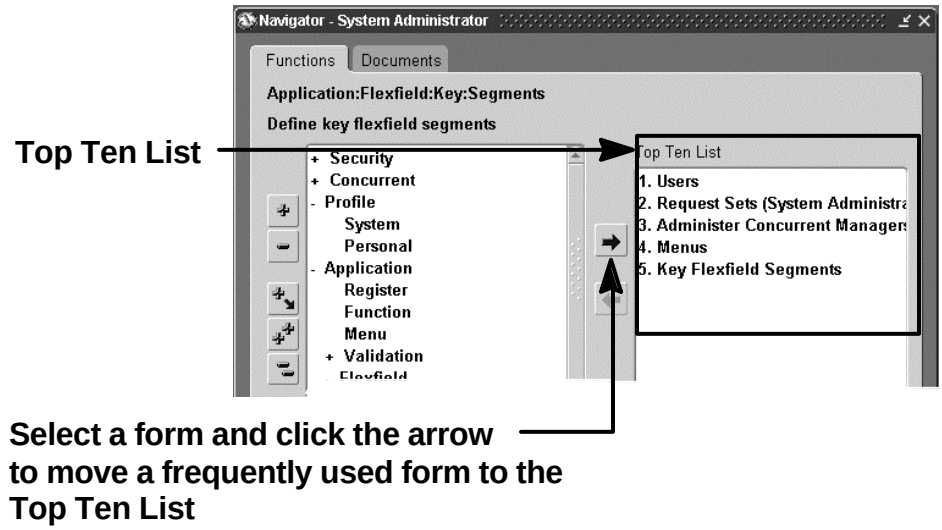
After this lesson you should be able to:

- **Create a personal Navigator top ten list**
- **Save a document to your Navigator for easy access**
- **Create a folder**
- **Define query criteria for a folder**
- **Customize the layout of data in a folder form**
- **Manage folder definitions**

Lesson Overview

You can use several features of Oracle Applications to enhance your proficiency in the system. Use a Navigator top ten list to put your commonly used forms on your Navigator. By using special forms, you can customize the presentation of data or fields. Additionally, you can create a folder definition in which you can save query criteria. This lesson explains how to use these features to make your access to the system easier.

Top Ten List



Using the Top Ten List

If there are forms that you use frequently, you can add them to a navigation top ten list located on the right side of the Navigator window. The top ten list displays your forms numerically so you can choose them instantly without having to search for them in the navigation list. You can add a maximum of ten forms to the top ten list and you can create a different top ten list for each responsibility for which you have access. A top ten list is unique for the responsibility and user sign-on combination that you use.

How to Create a Navigation Top Ten List

1. Select a frequently used form from the navigation list by highlighting it in the Navigator window.

2. Click the right pointing arrow to add that form to the top ten list.

3. Click the left facing arrow to remove a form from your top ten list.

4. To open a form in your top ten list, type the number that precedes the form you want to open. You can also click on it and press Open, or double-click on it.

> **Note:** Sometimes the form that you add changes names when it appears in the top ten listing. An example is that Suppliers becomes Vendors, or Orders, Returns becomes Order Workbench. Also note that the tenth entry is numbered 0 (zero), so it can be invoked by pressing a single keystroke also.

Top Ten Practice Instructions

Using the Payables, Vision Operations responsibility, to the Navigator Top Ten List add the command to submit requests. Hint: Submit and run mean the same.

Top Ten Practice Solution

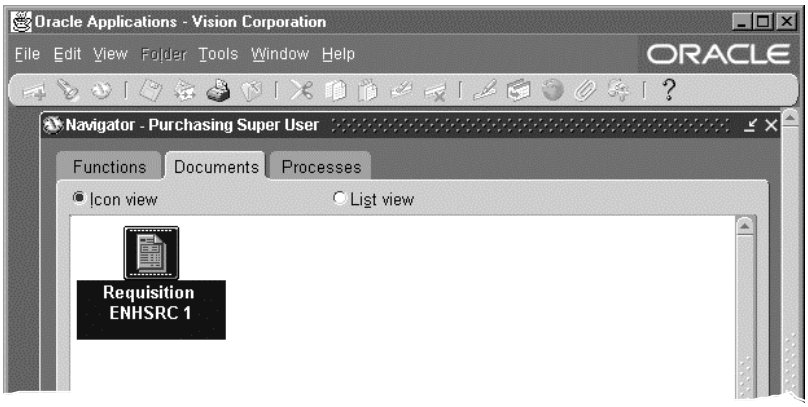
(M) File > Switch Responsibilities, choose Payables, Vision Operations from the list and click OK.

Expand the Navigator to show Other > Run > Requests and select it.

Click the right arrow to move it to the Top Ten List.

Placing Documents on the Navigator

(M) File > Place on Navigator



Using the Save to Navigator Option

Some Oracle Applications enable you to save a document to the Navigator for easy access when you first log into the system. The File menu will illuminate the Place on Navigator option when it is available within your application. One example is the Requests window of the SRS form.

The Documents tab on the Navigator window will display icons or list those documents that you have saved. This shortcut eliminates having to query the database to find your specific document. Instead, you can select it from the Navigator window and go directly to the window containing your document.

How to Access a Document from the Navigator Window

1. Select the Documents tab displayed at the Navigator window.

2. Select the document from the list of documents or document icons displayed to go directly to the applications form window for that document.

You can change the label of the document to whatever you like by pressing the Rename button.

You can delete the document from your Navigator by pressing Delete. Note that this will not delete the actual document, only your shortcut to it.

Documents Practice Instructions

- **Using the General Ledger, Vision Operations responsibility, enter a new journal using your name as the Journal name.**
- **Place the journal you created on the Navigator Documents region.**
- **Access your journal from the Documents region tab.**

Documents Practice Solutions

(M) File > Switch Responsibilities, select General Ledger, Vision Operations from the list, click OK.

(N) Journals > Enter, click the New Journal button.

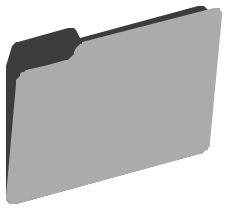
Enter your name in the Journal field and save your work.

Place it on the Navigator by choosing (M) File > Place on Navigator.

Go to the Navigator and click on the Documents tab to see the document you added, click on it. To open the journal double-click on it.

What You Can Do with Folders

- **Define folders**
  - **Name the folder**
  - **Define query criteria for the folder**
  - **Use folder tools to customize the presentation of data in the folder**
- **Open existing folder definitions**
- **Delete folder definitions**



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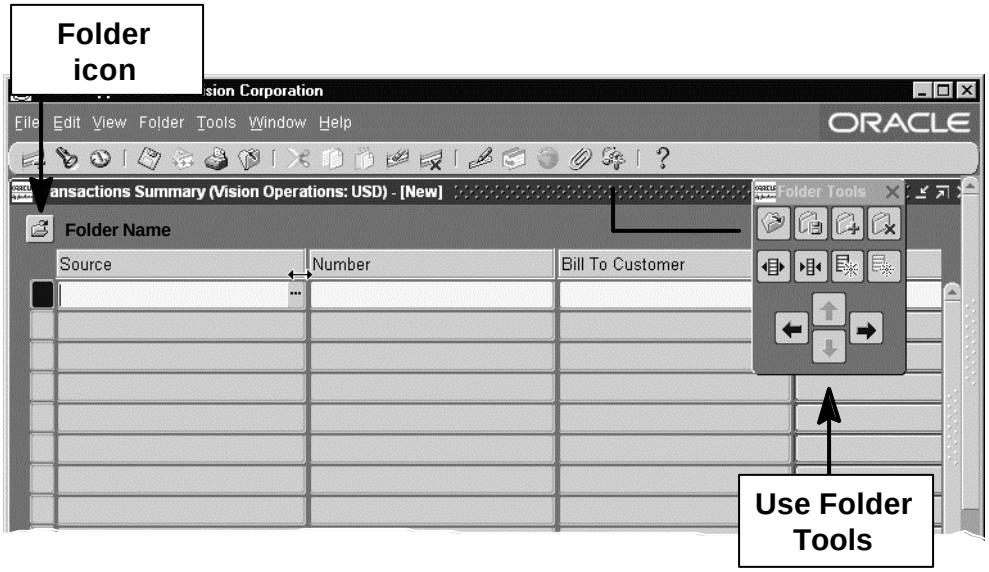
Using Folders

A folder is a special block in which the field and record layout can be customized. You can identify a folder from a regular block by noting that an Open Folder button appears in the upper-left corner of a folder block, or an enabled Folder Tools button appears on the toolbar when your cursor is in a folder block.

Although you have access to all of the records of a specific entity in a folder, you can customize a folder to retrieve only a subset of records and display those records in a specific layout. You can save your customizations to a folder definition, which defines the layout of your fields and the query criteria used to retrieve your subset of records.

Folders are language-specific. If you are running the application in German and save a folder, then if you later sign on in French, the German folder will not be accessible to you. This is because the prompts and search criteria you enter for a folder are language-sensitive.

Folders



Defining a Folder

You can create and save new folder definitions or open and delete existing folder definitions. When you open a new folder definition, the layout for the new folder definition replaces the layout for the current folder definition.

How to Create a New Folder Definition

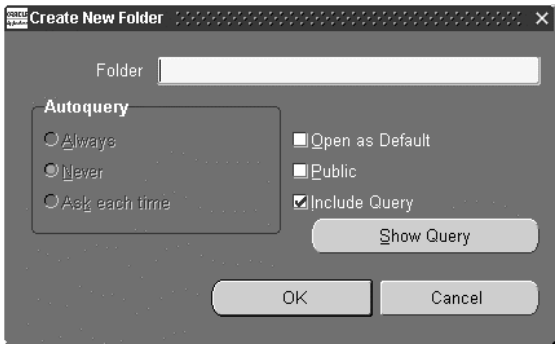
1. (M) Folder > New.
2. Enter a new and unique folder name.
3. Select the Autoquery frequency in which you want the folder to automatically query for a subset of records each time you open the folder definition.
4. Select Open as Default if you want this specific folder definition to open as your default each time you navigate to this form for the first time.
5. Select Public if you want other Oracle Applications users to have access to this folder definition.

Note: Users can never see records that violate basic security rules, regardless of any search criteria you specify in a folder.

6. Click OK when you are finished.

Querying Records in a Folder

- **Define query criteria**
  - **Always**
  - **Never**
  - **Ask each time**
- **Open as Default**
- **Public**
- **You can reset the query criteria by selecting (M) Folder > Reset Query**



Defining Query Criteria for a Folder

One advantage of a folder is that you can customize it to display only the records you want to see. You can easily define and alter the query criteria for any folder and save that criteria in a folder definition.

How to Define Query Criteria for a Folder

1. Run the query that you want, either by using Query Find or Query-by-Example. At least one record must be retrieved for the folder to memorize the query.

2. (M) Folder > Save As, if you want to save this query criteria in a new folder definition.

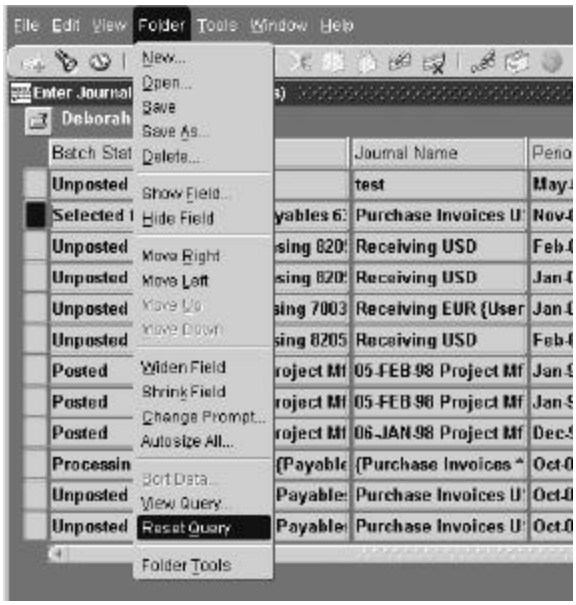
3. Enter a name for the folder definition.

4. Check Always from the Autoquery option group if you want this query to be performed every time you open this folder definition.

5. Click OK when you are finished.

When you save a folder definition, the query criteria is "locked in" to the folder definition. When you perform another query on that same folder definition, you actually query on the subset of records. If you want to perform a new Query-by-Example on the complete set of records, reset the query for the folder definition.

Resetting Query Criteria



Resetting the Query Criteria for a Folder Definition

1. (M) Folder > Reset Query, to clear the WHERE clause from the current folder definition, but it will retain the current folder name and its field layout. To view the query criteria for a folder definition, (M) Folder > View Query.

2. Perform another query and (M) Folder > Save to save the new query to your current folder definition.

3. To alter the sorting order of data in a multiple-record folder definition, (M) Folder—>Sort Data.

4. Choose one of the following sort options:

Ascending

Descending

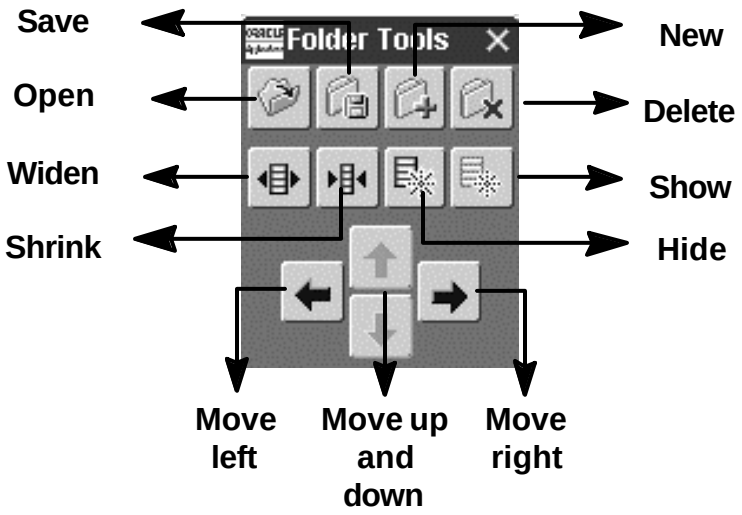
Unsorted

Note: Only the first three columns of a folder can be sorted.

5. Select View > Query By Example > Run to rerun the query in your folder definition to apply any ordering changes to the records.

6. Select Folder > Save or Folder > Save As to save this query criteria to a folder definition.

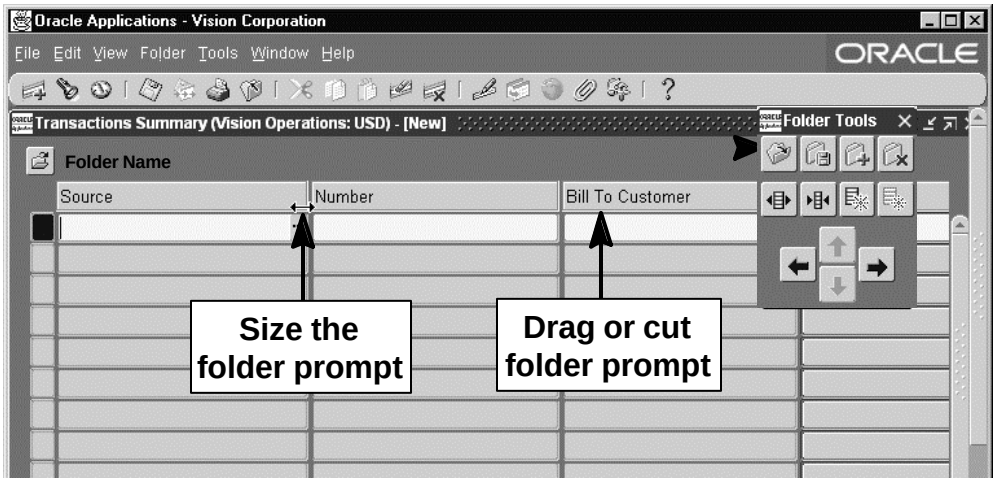
Folder Tools



Accessing Folder Tools

When you navigate to a folder block, the Folder Tools button becomes enabled on the Toolbar. Click this button to display the folder tools on your screen.

Direct Manipulation Techniques for Folders



Using Direct Manipulation Techniques on Folders

You can directly manipulate folder columns using the following techniques:

Drag the right edge of a prompt to resize the column.

Drag the center of the prompt to resequence the columns.

Delete the prompt to hide the column.

Left-click on the first three prompts to sort them.

Right-click on any prompt to change the label.

For more on using folders, see *Oracle Applications User's Guide* online help.

More Folder Tasks

- **Recovering Original Folder Definition**
  - **(M) Folder > Save As**
  - **Clear the check box called Open as Default,**
  - **OK**
- **Opening Another Folder Definition**
  - **(M) Folder > Open**
  - **Select a private or public folder definition**
  - **OK to replace current folder definition**

Recovering the Original Default Folder Definition for a Folder

Once you create a custom folder definition and make it the default, you can recover the original default folder definition shipped with the product. Note that if you like the original default folder definition, give it a name and save it (without making any changes) before you create any new folder de finitions. This way, you can open the original folder definition by choosing it from a list of all your predefined folder definitions.

1. With the folder currently specified as the default displayed, (M) Folder > Save As.
2. Clear the Open as Default option in the Save As window.
3. Click OK when you are finished.
4. Navigate to this form again to display the original default folder definition.

Opening Another Folder Definition

1. (M) Folder > Open to load a predefined folder definition. Or, click the Open Folder button located in the upper left corner of the folder block.
2. Select a private or public folder definition from the list window that is displayed, and click OK to replace the current folder definition with the new folder definition.

More Folder Tasks

- **Saving Changes to a Folder Definition**
  - **(M) Folder > Save As or Save**
  - **Type a name or keep the same name**
  - **OK**
- **Deleting a Folder Definition**
  - **(M) Folder > Delete**
  - **Select a folder**
  - **OK**

Saving Changes to a Folder Definition

1. (M) Folder > Save to save any layout or query changes made to the current folder definition or (M) Folder > Save As to save the current folder definition under a new name.
2. Click OK after you have completed the information requested in the Save Folder window.

If you save a folder definition to Open as Default and then open another folder definition and save that second definition also as Open as Default, the second definition is reset as the new default.

If you modify a public folder definition in any way, saving it makes a copy of it that is a private folder definition.

Deleting a Folder Definition

1. Select Folder > Delete.
2. Select a folder definition from the list that is displayed and click OK to delete the definition. Note that you can only delete folders you have created. If another user is referencing that folder definition as their Open as Default folder, that reference is deleted as well.

Folder Practice Instructions

- **Using the Receivables, Vision Operations responsibility, create a folder for your customer AT&T Universal Card of Active Status. The folder should show a summary for this customer. Hint: (N) Customers > Summary, find AT&T and Status: Active, (M) Folder > New.**
- **Hide the Alternate Name and Taxpayer ID fields.**
- **Move the Use field to the far left of the form.**
- **Save your work.**
- **Find your AT&T Summary again and access your folder.**

Folder Practice Solution

- (M) File > Switch Responsibilities, select Receivables, Vision Operations from the list and click OK.
- (N) Customers > Summary. Click the Find icon on the toolbar.
- In the Find Customers window, click on the LOV in the Customer Name field and enter search criteria, such as AT%, then click the Find button.
- When the list appears, select AT&T Universal Card from the list and click OK.
- In the Find Customers window, click on the poplist in the Status field and select Active.
- Click the Find button.
- To create a folder, (M) Folder > New. Enter your name as the name of the folder definition. Accept the defaults for other fields.
- Place your cursor in the Alternate Name field and (M) Folder > Hide Field.
- Place your cursor in the Taxpayer ID field and (M) Folder > Hide Field.
- Hold the mouse over the Use field's prompt and click and drag it to the far left.
- (M) Folder > Save
- (N) Customer > Summary
- Click the folder icon in the top left corner of the window to open a list of folder definitions.
- Highlight your folder definition and click OK.

Summary

- Creating a top ten list
- Saving a document to the Navigator
- Creating a folder
- Querying records in a folder
- Customizing the layout of data in a folder
- Managing folder definitions

Setting Personal Profile Options

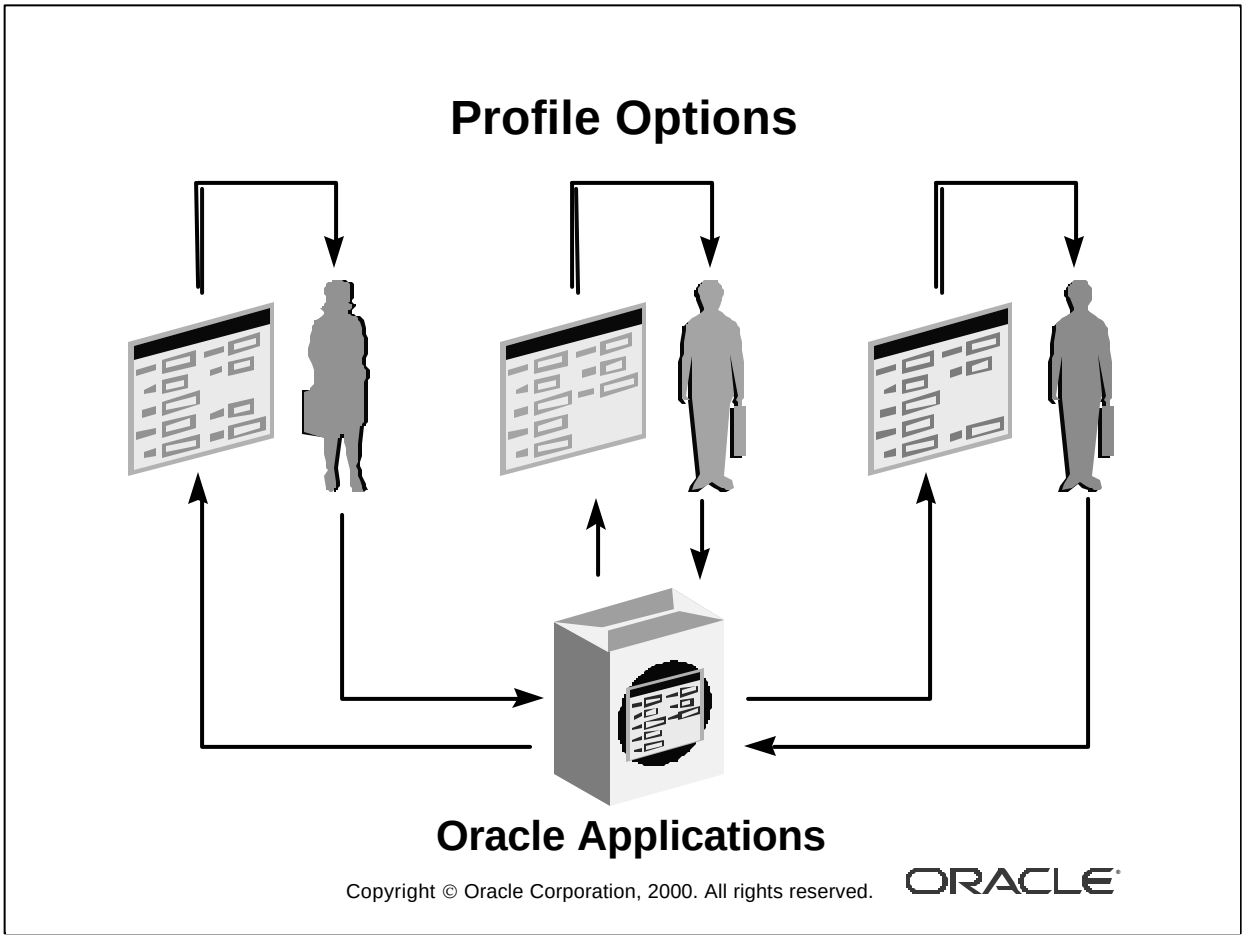
Lesson Objectives

After this lesson, you should be able to:

- **View user profile options that are common to all Oracle Applications**
- **Change your profile options to customize your default preferences**

Lesson Overview

Using profile options, you can control the behavior of certain Oracle Applications features. This lesson explains the levels of profile options and how you can change them to suit your personal business requirements.



Overview of User Profiles

A *user profile* is a collection of changeable options that affect the way your applications run. Oracle Applications establishes a value for each option in a user's profile when the user logs on or changes responsibility. You can change the value of a user profile option at any time. Oracle Applications provides this and other options so that you can alter the behavior of your applications to suit your own preferences.

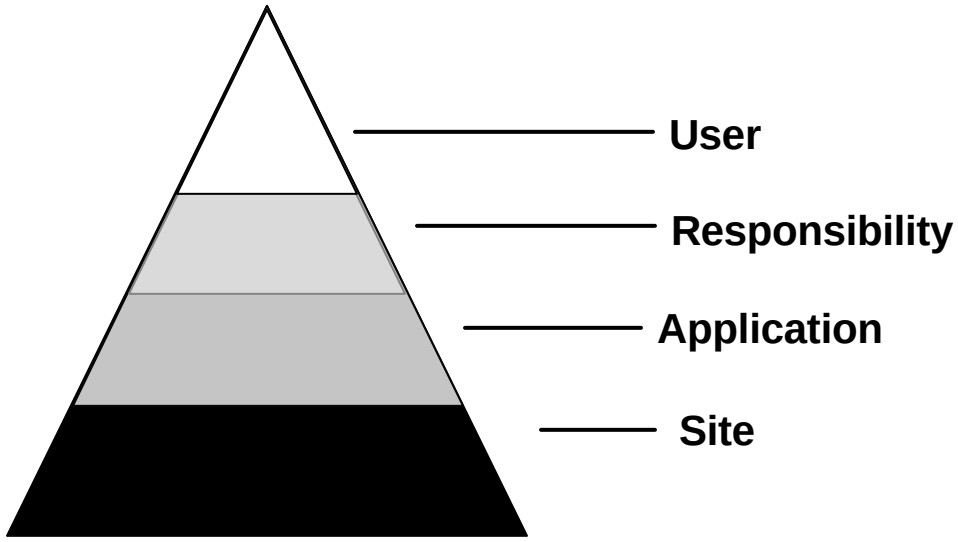
Oracle Applications uses a set of user profiles options that are common to all application products. In addition, each application has its own unique set of user profile options.

User profile options can be set at one or more of four levels:

- Site
- Application
- Responsibility
- User

Your system administrator can set default option values at any of these levels.

User Profile Hierarchy



User Profile Hierarchy

Oracle Applications treats user profile levels as a hierarchy, where User is the highest level of the hierarchy, followed by Responsibility, Application, and at the lowest level, Site. Higher-level option values override lower-level option values.

User Level

***User* level option values affect the way applications run for a given application user.**

Responsibility Level

***Responsibility* level option values affect the way applications run for all users of a given responsibility.**

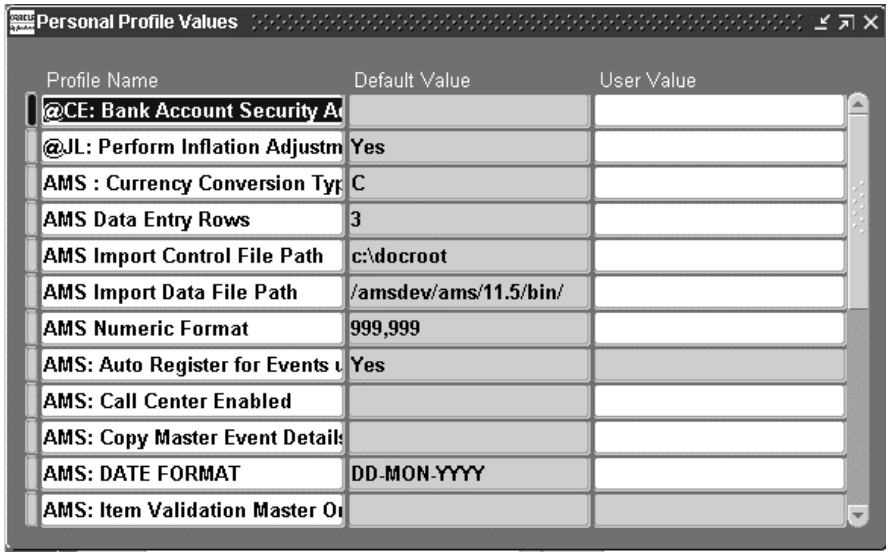
Application Level

***Application* level option values affect the way a given application runs.**

Site Level

***Site* level option values affect the way all applications run at a given installation site. Typically, your system administrator will set this option after installing Oracle Applications at a site.**

Setting Personal Profile Values



Your Personal User Profile

You can change a user profile option value using the Personal Profile Values window, where you can display all your options and review the values your system administrator has set for them.

If you do not set your own user level option values, your user profile options assume the values your system administrator has set for them at the various levels.

How to Change a Profile Option Value

1. (M) Edit > Preferences > Profiles.

This window displays all your user profile options and their values. If you wish to display only specific user profile options, first choose View > Query By Example > Enter to enter search criteria in the Profile Name field, then choose View > Query By Example > Run to run the search.

The name of the user profile option appears in the Profile Name field while the Default Value field displays the run-time value of that option. The System Administrator sets default values for many of the profile options. Some profile options may not display a default value.

2. Move your cursor to the User Value field of the option whose value you wish to modify.

3. Enter a new value for the option if it is updateable, or if the List icon appears, choose a value from the list of available values.

Profile Option Values

- **User values override default values.**
- **Values are validated, except for number or date values.**
- **You cannot delete a profile option, but you can clear the value.**

Your Personal User Profile (continued)

If the profile option is not updateable, the message "Item is protected against update," appears on the message line when you try to change the value. You can change most of your user profile options; values you enter in the User Value field override values preset by the System Administrator. A few profile options cannot be changed, but are displayed for informational purposes only.

For most personal profile options, Oracle Applications automatically checks the value you enter to ensure it is valid.

Attention: Number or date values are not validated, therefore, you must make sure that you enter a valid value for profile options that require a number or date; otherwise, your personal profile option may not work as you expect.

Though you cannot delete a profile option from your personal profile, you can clear its value (if it is updateable) by highlighting the field and pressing [Backspace] or by choosing Clear, Field from the Edit menu. If you clear the value, the change does not take effect until you sign on again or change responsibilities.

4. (M) File > Save to save your change.

Your change will take effect when you either change responsibilities or log out and log back in.

Personal Profiles Values

Option	Description
Concurrent: Hold Requests	Specifies whether to hold a request temporarily, until you remove the hold
Concurrent: Report Copies	Specifies the number of copies of a report to print
Concurrent: Request Start Time	Specifies the date and time for a request
Concurrent: Sequential Requests	Specifies whether to run requests sequentially

Defining Personal Profiles Values

All reports and programs in Oracle Applications run as concurrent processes whether you submit them using the Submit Requests window or a product-specific submission window. Submitted reports and programs are referred to as *concurrent requests*. Each concurrent request runs according to a set of concurrent processing options.

The Personal Profiles Values window sets the defaults for these profiles. If you want to change the value of a default, you must change the value of the corresponding user profile option using the Personal Profiles Values window in your application.

More Personal Profiles Values

Option	Description
Concurrent: Save Output	Specifies whether to save report output to a file
Printer	Specifies the printer for printing your report output
Concurrent: Show Requests Summary After Each Request Submission	Display Requests Summary each time a request is submitted or not
Viewer: Default Font Size	Set default font size for report output in the Report Viewer window

Summary

- **Viewing your personal User Profile**
- **Setting personal User Profile options**

Personal Profiles Practice

- **In this practice you will view personal profile options for Concurrent:Report Copies.**
- **Change the report copies User Value option to 2.**
- **Save your work.**

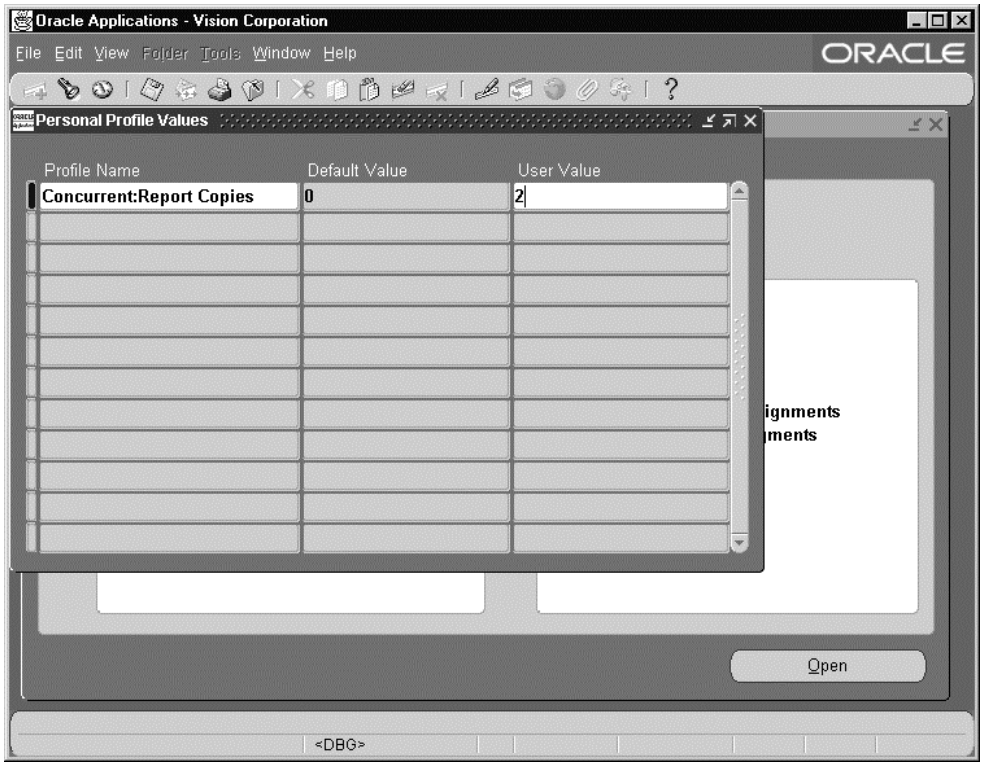
Practice Solution

• Navigate to the Profile Values window, (M) Edit > Preferences > Profiles.

• Find the Profile name of Concurrent:Report Copies.

• Place your cursor in the User Value field and enter 2. Verify that your screen resembles the slide on the following page.

• (M) File > Save.



Managing an Attachment to a Form

Lessons Objectives

After this lesson, you should be able to:

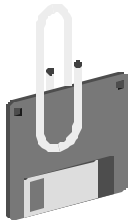
- **Identify the availability of attachments**
- **Attach a document to a record**
- **Copy an attachment from another record**
- **View an attached document**
- **Delete an attached document**
- **Use the fields in the Attachments window**

Lesson Overview

You can attach or link data such as images, word processing documents, spreadsheets, or video to some Oracle Applications records. This lesson discusses how to manage these attachments to records.

Attachments

- **Images**
- **Word processing images**
- **Spreadsheets**
- **Web pages**
- **Video**



Why Use Attachments?

To illustrate or clarify your application data, you can link non-structured data such as images, word processing documents, spreadsheets, web pages, or video to more structured application data. For example, you could attach images to inventory items or video to manufacturing operations.

Invoke the Attachment form to view an attachment by pressing the Attachments toolbar button.

The Disabled Attachments Icon

Identifying the Availability of Attachments

The toolbar Attachment icon indicates whether the Attachments feature is enabled in a form or block. When the button is disabled, the Attachments feature is not available. When the Attachments feature is enabled in a form or block, the icon becomes a solid paper clip.

The icon switches to a paper clip holding a paper when the Attachments feature is enabled in a form block and the current record has at least one attachment.

You can use the profile option, Indicate Attachments, to turn off indications of attachments when querying records. This is an option you may use for performance reasons.

Adding a New Attachment

- **Query or enter a data record.**
- **Click the Attachments toolbar icon.**
- **Enter a category and description.**
- **Type in your document text, or specify a file name or Web page URL.**
- **Save your work.**

Attaching a Document to a Record

You can attach a document to any record for which attachments are enabled. For example, you can attach images to inventory items in Oracle Inventory, or you can attach a document to an order line in Oracle Order Entry.

How to Attach a New Document to an Oracle Applications Record

1. Query or enter a data record in an Oracle application window.
2. Click the Attachment toolbar icon. The Attachment window opens.
3. Enter a category and description.
4. Type in your document text, or specify a file name or web page URL.
5. Save your work.

How to Attach an Existing Document to an Oracle Applications Record

In an application window, query or enter a data record.

1. Click the Attachment toolbar icon. The Attachment window opens.
2. Click the Document Catalog... button. The Document Catalog window opens.
3. Query an existing document.
4. Check one or more documents.
5. Click the Attach (number of documents) button.
6. Save your work.

What You Can Do with Attachments

- **Copy attachments**
- **View an attached document**
- **Delete an attachment**

Attachments

You can copy existing attachments to other data records. You can view attachments to any records, and delete attachments.

Copying Attachments

Copying Attachments

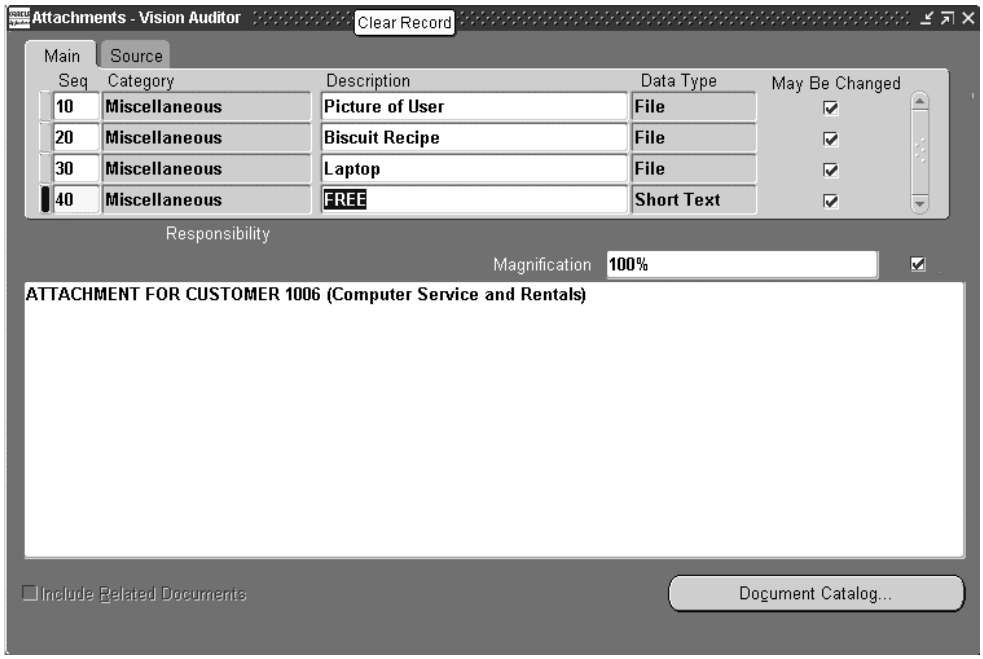
Oracle Applications keeps a catalog of documents that have been attached to applications data records. You can take advantage of this catalog if you want to attach an existing document to a second or subsequent data record.

If the document you want to attach already exists within Oracle Applications, click Document Catalog. When the Document Catalog window opens, query an existing document, check one or more documents, and then click Attach 1.

How to Copy an Attachment from Another Record

1. Query the record you want to attach a document to in an application window. (Do not query the record that already has the attachment.)
2. Click Attachments on the Toolbar.
3. Click the Document Catalog... button and enter query criteria in the Attached To: field for the application object you want to copy the attachments from.
4. Click the Find button and select a document.
5. Click the Attach 1 button.
6. Save your work.

Viewing Attachments



Viewing and Deleting a Document

Viewing an Attached Document

1. Query a record.
2. Click the Attachment icon on the Toolbar.
3. Move the cursor to the document you want to view. The attachment appears in the document block or you must click the Open Document button to see the document in a browser.

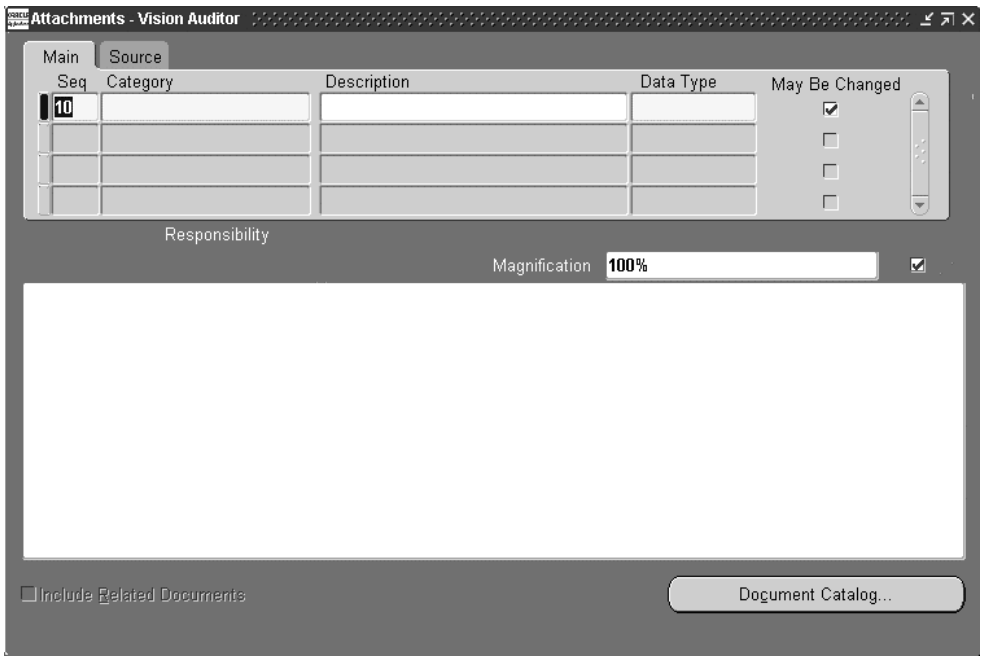
Deleting an Attachment

When you delete an attachment, you merely remove the association between a record and a document. The document itself is not removed from your file system or database.

How to Delete a Record's Attachment

1. Query a data record in an application window.
2. Click the Attachment icon on the Toolbar.
3. Move the cursor to the attachment that you want to delete.
4. Select Edit > Delete.
5. Click the Attachment button to delete the attachment or the Document and Attachment button to delete both.
6. Save your work.

Examining the Attachments Window



Field Definitions of the Attachments Window

Use the Attachments window to view or delete existing attachments, and create new attachments. You must provide the following information when you create an attachment:

Category

The category controls which forms can access the document. Each form that enables Attachments must list which document categories it can access. A "Miscellaneous" category will be assigned to each form registered for Attachments to facilitate "cross-form" visibility of Attachments.

Datatype

An attached document can be:

Document Reference—A reference to any type of document stored in a database that is accessed through a Document Management system.

Short Text—Text stored in the database containing less than 2000 characters.

Long Text—Text stored in the database containing 2000 characters or more.

File—A file that requires other server applications to view, such as Microsoft Word or Microsoft Excel, image files such as .JPG files, or other types of files. When you attach or create a File type document, the document is loaded into the database. When a File document is selected, the lower half of the Attachments window displays an "Open Document" button that invokes a web browser and passes the file to the browser.

Attachments Window Fields

- **Category**
- **Datatype**
- **File or URL**
- **May be Changed**
- **Document Block**

Field Definitions of the Attachments Window (continued)

Web Page—A URL reference to a web page that you can view with your web browser. You must define your web browser in the profile option Web Browser to view a web page attachment.

File or URL

If the document is a file, specify the location of the document. The document will then be loaded into the database. If the document is a web page, specify the web page URL.

May be Changed

The May be Changed checkbox indicates if you are able to edit the attachment.

Document Block

The document block is the section of the window below the multi-line attachment block. The document block displays the current document in the attachments block, or it displays an Open Document button that opens your document for viewing with a browser.

To improve performance while scrolling through lists of attachments, uncheck the coordination checkbox. The document block will not update until you turn coordination on again.

Attention: If you maximize the document block window, no other operations can be performed until you restore the block to its original state.

Summary

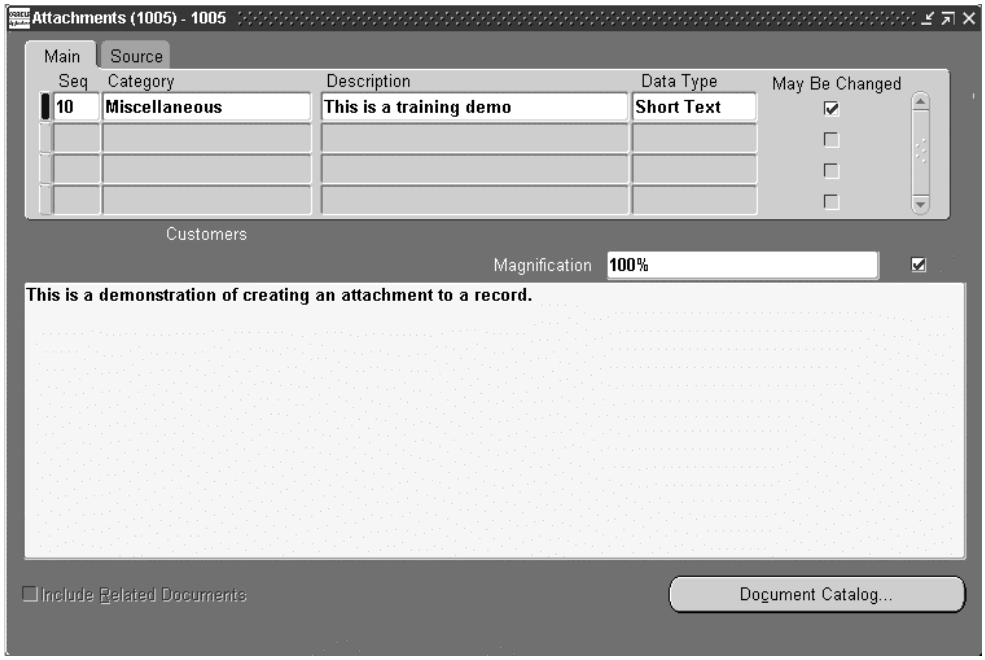
- **Attaching a document to a record**
- **Copying an attachment**
- **Viewing an attached document**

Attachments Practice Instructions

- **Using the Receivables, Vision Operations responsibility, attach a document to the AT&T Universal Card customer.**
  Hint: (N) Customers > Standard
- **Create a short text attachment.**
- **Enter your text in the Attachments window.**
- **Save your work.**

Attachments Practice Solution

- (N) Customer > Standard. Find your customer using Find.
- After finding your customer, click the Attachments icon on the toolbar.
- Click in the Seq field , accept the number sequence.
- In the Category field, enter Miscellaneous.
- Enter a description in the Description field.
- In the Data Type field, enter Short Text.
- In the yellow text area enter text for your attachment.
- Your form should resemble the one in the following slide.
- Click the Save icon on the toolbar.



Using Flexfields

Lesson Objectives

After this lesson, you should be able to:

- **Identify a flexfield**
- **Describe the two types of flexfields**
- **Examine an expanded flexfield**
- **Search for data in a flexfield**

Lesson Overview

Flexfields are found in every Oracle Application and are used to store information that is important and unique to your company. In this lesson you will examine the two types of flexfields and learn how to search for flexfield data.

Flexfields

A flexfield is a flexible data field that your organization can customize for your business needs without programming. Oracle applications uses two types of flexfields:

- **Key flexfields**
- **Descriptive flexfields**

Identifying Flexfields

A flexfield is a field made up of sub-fields, or segments. A flexfield appears on your form as a pop-up window that contains a prompt for each segment. Each segment has a name and a set of valid values. There are two types of flexfields: key flexfields and descriptive flexfields.

When your organization initially installs Oracle Applications, you and your organization's implementation team customize the key flexfields to incorporate code segments that are meaningful to your business. You decide what each segment means, what values each segment can have, and what the segment values mean. Your organization can define rules to specify which segment values can be combined to make a valid complete code (also called a combination). You can also define relationships among the segments. The result is that you and your organization can use the codes you want rather than changing your codes to meet Oracle Applications' requirements.

Business Needs

- **Intelligent fields**
- **Field validation**
- **Ability to modify structure**
- **Capture information not included in base application or existing fields**
- **Query and report on custom fields**

The Basic Business Needs for Flexfields

With Oracle Applications flexfields you can satisfy the following business needs:

Using “intelligent” fields—fields comprising one or more segments, where each segment has both a value and a meaning

Relying upon your application to validate the values or the combination of values that you enter in intelligent fields

Changing the structure of an intelligent field depending on data in your application

Capturing additional information that is not provided by existing fields

Customizing data fields to meet your business needs without programming

Querying intelligent fields for specific information

Review Question

Identify which of the following is NOT a reason to use flexfields.

a. Validate values and combination of values.

b. Capture additional information that is not provided by existing fields.

c. Add new logical processing not provided by the existing application.

d. Customize data fields without programming.

Review Question Solution

Identify which of the following is NOT a reason to use flexfields.

a. Validate values and combination of values.

b. Capture additional information that is not provided by existing fields.

c. Add new logical processing not provided by the existing application.

d. Customize data fields without programming.

Key Flexfields

A key flexfield is a field that you can customize to enter multisegment values such as part numbers, account numbers, and so on.

Examples:

- **P35-297-A (part number)**
- **0450-387-3478 (account number)**

Using Key Flexfields in Oracle Applications

A *key flexfield* is a field made up of segments, each of which has both a value and a meaning. You can think of a key flexfield as an "intelligent" field that your business can use to store information represented as codes.

Most organizations use codes to identify general ledger accounts, part numbers, and other business entities. Each segment in the code represents a characteristic of the entity. A combination of segment values, also known as a *key flexfield code combination*, uniquely describes a business entity stored in a key flexfield. When you change the value of one or more segments in a key flexfield, you change the combination of segment values.

Your organization decides the following information for each key flexfield: (1) how many segments an entity has, (2) what each segment means, (3) what values each segment can have, and (4) what each segment value means. Your organization can also define rules that govern which combination of segment values are valid (cross-validation rules) dependencies among the segments.

A key flexfield looks like any other field in a block. You can simply type the segment values you want into a key flexfield and separate each segment with a character called a *segment separator*. Alternatively, you can open a flexfield window for a key flexfield to display a separate field for each of its segments.

Descriptive Flexfields

A descriptive flexfield is a field you customize to enter additional information for which your Oracle Applications product has not already provided a field.

Example:

You want to provide an additional field to enter an Internet address for a customer.

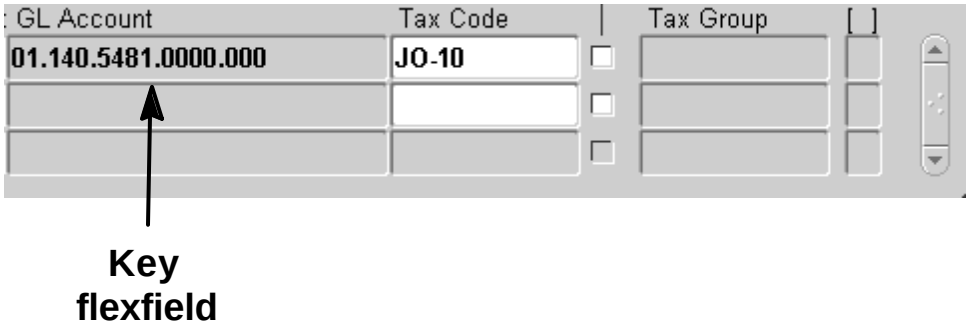
Using Descriptive Flexfields in Oracle Applications

A *descriptive flexfield* gives you room to expand your forms, because Oracle Applications cannot predict all the possible information you may want to track. Your organization can use descriptive flexfields to capture additional information that is important and unique to your business.

A descriptive flexfield appears in a block as a two-character, unnamed field enclosed in brackets. If you are viewing data in a table format, the descriptive flexfield will appear at the top of the column as an unnamed field enclosed in brackets.

A descriptive flexfield window is displayed when you move the cursor into a customized descriptive flexfield. Your organization's implementation team can customize a descriptive flexfield to include as many additional fields as your organization needs. These fields, also called *segments*, appear in the descriptive flexfield window.

Key Flexfield



How Key Flexfields Appear on Forms

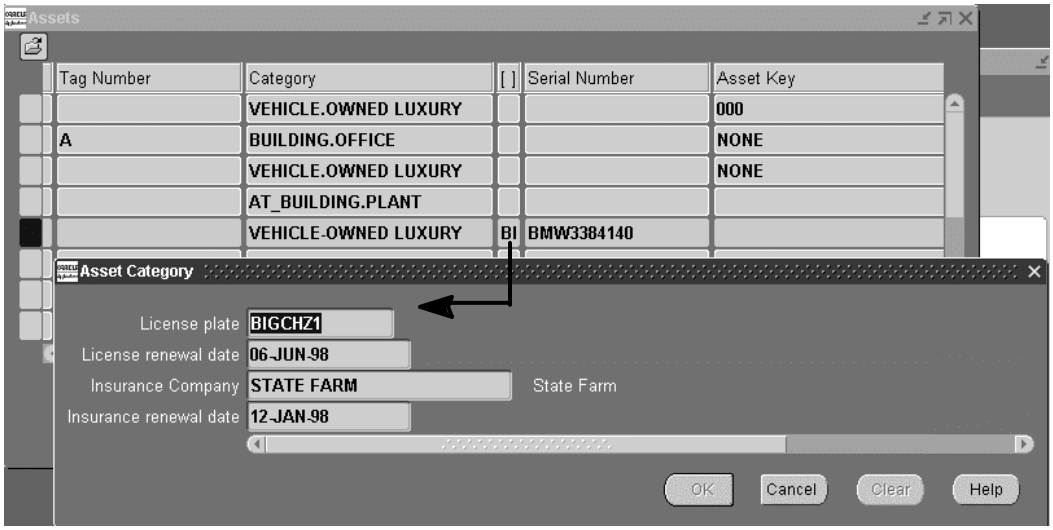
A key flexfield can have multiple parts to it, and when they are displayed on a form they appear as one long series of numbers or letters, separated by periods. The periods separate each segment of the flexfield.

Expanded Key Flexfield

Examining the Expanded Key Flexfield

You can display the full flexfield with field names by clicking on the flexfield's LOV icon. The slide displays an accounting flexfield with 5 segments. The Company segment has the value 01, the Department segment's value is 110, and so on. By clicking on the Combinations button you can see valid combination of the segments.

Expanded Descriptive Flexfield



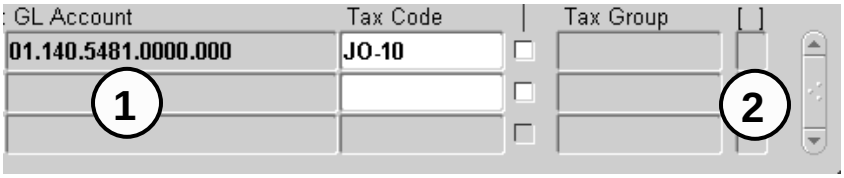
How Descriptive Flexfields Appear on Forms

A descriptive flexfield appears on a form as a single-character, unnamed field enclosed in brackets. Just like in a key flexfield, a pop-up window appears when you move your cursor into a customized descriptive flexfield. And like a key flexfield, the pop-up window has as many fields as your organization needs.

You can display the full flexfield with field names by clicking on the flexfield's LOV icon. The flexfield in the slide shows 4 segments.

Review Question

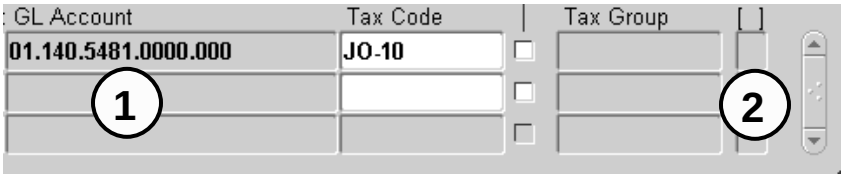
Label the flexfield types.



1. _____ flexfield
2. _____ flexfield

Review Question Solution

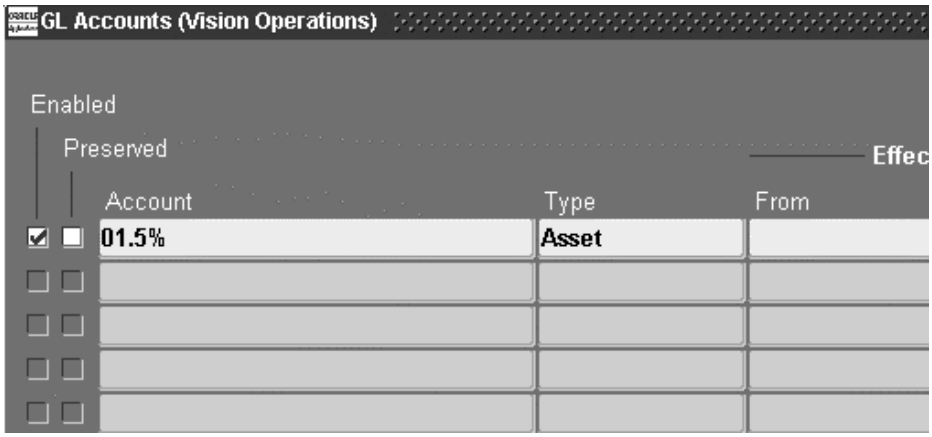
Label the flexfield types.



1. Key flexfield

2. Descriptive flexfield

Using Search Criteria in a Flexfield



Searching for Data Using Flexfield Criteria

You can enter search criteria in a flexfield when you use query-by-example. By entering search criteria in a flexfield, you can retrieve records of data that satisfy criteria in the individual segments of your key or descriptive flexfields. For example, suppose you want to search for all Accounting Flexfield combinations in the Accounting Flexfields Combinations window that contain the segment value "01" in the first segment. With query-by-example, you can enter this criteria in the Accounting Flexfield to accomplish this task.

When you enter search criteria for a flexfield segment, you can use wildcard characters or any of the query operators as part of the search phrase.

If your flexfield segment has a list available, you can choose the List icon within the flexfield window to select a value from the list for your search criteria. Note that if you enter a value for a segment, your application automatically enters the default value for any other segments that depend on the value you enter. If you do not want a default value as part of your search criteria, you can clear the field, or you can enter another value in that field.

Searching a Flexfield

- **(M) View > Query by Example > Enter.**

  In addition to entering search criteria in any of the fields of the block, you can bring up a key flexfield window and enter search criteria.

- **(M) Edit > Edit Field... and enter criteria.**

  When you are done, choose OK to close the flexfield window.

- **(M) View > Query by Example > Run to perform the search.**

How to Enter Search Criteria in a Key Flexfield

1. (M) View > Query by Example > Enter.

In addition to entering search criteria in any of the fields of the block, you can bring up a key flexfield window and enter search criteria.

2. (M) Edit > Edit Field... and enter criteria.

When you are done, choose OK to close the flexfield window.

3. (M) View > Query by Example > Run to perform the search.

Note: If you prefer, you can also enter your concatenated segment search criteria directly into a key flexfield display when your block is in Enter Query mode. The concatenated search criteria must include the appropriate segment separator character.

How to Enter Search Criteria in a Descriptive Flexfield

To enter search criteria in a customized descriptive flexfield when your current block is in Enter Query mode, simply navigate to the descriptive flexfield to automatically display the descriptive flexfield window. When you are done entering search criteria in any or all of the descriptive flexfield segments, choose OK to close the descriptive flexfield window and then choose Run from the View, Query by Example menu to perform the search.

Attention: If you set the user profile option Flexfields:Open Descr Window to `No', you must choose Edit Field... from the Edit menu to open the descriptive flexfield window.

Summary

- Identifying a flexfield
- Describing the two types of flexfields
- Examining an expanded flexfield
- Searching a flexfield

Flexfield Practice Overview

In this practice you will examine Oracle Applications flexfields.

Practice Instructions

- **Using the Assets, Vision Operations responsibility, perform an inquiry for financial information for an asset.**
  Hint: (N) Inquiry > Financial Information
- **Find an Asset Category flexfield and expand it.**
- **Using the General Ledger, Vision Operations responsibility, search for an accounting flexfield combination.**
  Hint: (N) Setup > Accounts > Combinations
- **Do a search for all flexfields with Company 01 and Department 410.**

Practice Solution

Assets

- (N) Inquiry > Financial Information, and click the Find button.
- When you locate a flexfield, click in it and it expands. Verify that your screen resembles the following screen.
- Click Cancel after you have viewed the flexfield.

General Ledger

- (M) File > Switch Responsibility
- (N) Setup > Accounts > Combinations
- (M) View > Query By Example > Enter
- Place your cursor in the Account field and go into Edit mode. (M) Edit > Edit Field
- When the Operations Accounting Flex window appears, select your criteria for the query from the LOV. Put your cursor in the Company field and select 01 from the list. Then put your cursor in the Department field and select 410 from the list and click OK.
- Click OK in the Operations Accounting Flex window.
- Run the query, (M) View > Query By Example > Run.